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**Swiss Tax & Accounting**

Information sheet

## Tax filing process

### STEP 1

YOU **contact** us.

### STEP 2

TOGETHER we **discuss your personal situation** either on the phone, vide call or in our offices in Solothurn. We will give you a preliminary cost estimate for our service. This initial consultation is without any obligation on your side and free of charge for max. ½ hr.

### STEP 3

If you agree to work with us, WE send you a one-page **list of the information and documents** which are 'normally' needed to prepare the tax return. Not everything on this list will apply to your situation, but it is advisable to review the list carefully so that we do not forget or miss anything. In case of questions feel free to contact us.

### STEP 4

If you give us the go-ahead for engaging our services, then WE will setup a folder for you on our portal and **YOU can upload the relevant information and documents**. Alternatively, we can also send us the documents by email or postmail even though we prefer the 'portal option'. *Confidentiality statement:* We will keep confidential all the information and documents that we obtain from your side. This will only be used for the purpose of preparing your Swiss tax return.

### STEP 5

WE will review the documents and **prepare the tax declaration** and tax calculation. We will send you a notice if anything is missing or if there are any questions.

### STEP 6

WE will send you an email once the final version of the tax declaration is on the portal and ready for your review and approval.

## STEP 7

Upon your approval **we will submit the tax declaration electronically to the tax office and send you the submission confirmation page by email**. Some cantons do not yet have the online filing option available. In this case, we will send you the tax declaration to your home address for signature and filing.

## STEP 8

After the tax declaration is filed, the **tax office** will check it and issue the **final assessment** and the final tax statements (refund notice or invoice). This usually takes several months, in Zürich up to 2 years...

The final tax assessment will either confirm our figures or list any deviations. In case of deviations there is a deadline of thirty days to raise an objection.

## STEP 9

Optional:

**You can appoint us as your Swiss tax representative.** With this, any correspondence from the tax office is then routed through our office. The tax office will contact us if they have any questions and vice versa and a copy of the final tax assessment will be sent here so we can check it. This tax proxy (PoA) is optional and can be revoked at any time.

If you have given us a proxy (PoA) to be your tax representative, then we will receive (a copy) of the final tax assessment. In this case, WE will check the tax assessment and inform you on the result. If there are any deviations, we advise whether filing an objection is advisable.

If you have not appointed us as your tax representative, then we will not receive (a copy) of the final tax assessment. You will need to forward this document to us upon receipt if you want us to check it. Please note that the tax assessments gets legally binding and cannot be changed after the 30-days objection deadline.

## STEP 10

If we are registered as your tax representative, then we will receive your tax forms for the **next filing** directly from the tax office. We will send you an email once these are received and extend the filing deadline, if necessary. If the tax proxy is not in place, and if you want to engage our services again then please let us know as soon as you have received the tax forms from the tax office.

In both these cases we then re-start at STEP 4 with the necessary documents for the next tax filing.

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If you have any questions, please do not hesitate to contact us

by email: [taxteam@expattax.ch](mailto:taxteam@expattax.ch)

or by phone: +41 32 623 30 55