

# CHECK LIST FOR YOUR TAX RETURN 2023

Name \_\_\_\_\_

Phone number during the day \_\_\_\_\_

First name \_\_\_\_\_

E-mail \_\_\_\_\_

## Tax return 2023 and envelope

### Income (in Switzerland as well as abroad)

- Yearly salary statement(s) main and extra income / unemployment benefit(s) / daily allowance 2023
- Balance and income statement (incl. details) of self-employed activity from 1.1.23 – 31.12.23
- Social security and pension statement(s) 2023: AHV, IV, pension fund, SUVA, foreign pension, etc. (if additional payments incl. disposal)
- Alimony: received alimony in 2023; child alimony have to be declared separately (copy of separation/divorce convention please enclose)

### Property owners (in Switzerland as well as abroad)

- Information about properties (imputed rental value, tax value and construction year); self-used foreign properties purchase contract(s)
- Net rental income (without additional charges) 2023. Apartment building: rent schedule and maybe rental contracts
- Copy of paid invoices of maintenance 2023 (e.g. building insurance, chimney sweeper, boiler service etc.). The date of payment is relevant and not the invoice date. Please provide payment details for bills paid in December
- Statement from the condominium association (balance sheet, income statement and costs allocation), incl. renewal fund 2023
- Paid building lease charges (Baurechtszinsen) 2023 (only for rented properties)
- Copie(s) of received financial contribution for the efforts concerning energy and ecology activities / proof of payments of the buyback price of the photovoltaic construction in 2023

### Fortune/wealth (in Switzerland as well as abroad)

- Balance statement(s) as of December 31 and interest statement 2023 of all your bank and postale accounts, original document from your lottery win (domestic lottery and domestic sports betting a. o. are tax free up to CHF 1 Mio.)
- Wealth tax statement 2023 (includes balances, income, purchases and sales) or custody statements 2023 (includes only the balances at the end of the year, that's why we need also all dividend statements and all documents about purchases and sales)
- Inheritance: copy of the inventory (date of death, your part of the inheritance, property holdings). Inheritances have to be declared in the year the testator died. The income and wealth are taxable from the heirs (from the date of death until the end of the year)
- Details about received or given gift(s) in 2023
- Documents of the surrender value of life insurances as of 31.12.2023
- Other assets (money in cash, precious metal, gems, collections, crypto currency etc.)
- Loans or current accounts in legal entities

## I pick up the documents in person

## Copy of the tax return as PDF instead a paper copy

### Professional expenses/further education

- All expenses have to be proved e.g. computer purchase except the costs for public transportation (TNW area).
- Car kilometers from your home adress to your office in 2023 and a confirmation from your employer that you need the car for your work. If you have a company car: information about the km to/from the workplace (free of charge transport)
- Part-time employment: number of work days / working time and employment factor in %
- Extra costs for weekly commuters (copy of rental contract and costs for the weekly homecoming with the public transportation)
- Further education and retraining costs: copies from the bills e.g. language course, coaching etc.

### Debts/interest on debt

- Balance as of December 31, 2023 as well as the paid interests in the year 2023 (mortgage, loan, credit, credit cards, current account liabilities, the owed taxes)

### Further deductions/indications

- Confirmation of the payments into the 2<sup>nd</sup> and 3<sup>rd</sup> pillar pension in 2023
- Receipts/documents of the charitable donations and also member ships of political parties in 2023
- Payment receipts for support contributions in 2023 incl. information about the supported person. For foreign payments: proof that the supported person is needy is mostly necessary
- Yearly statement of your health insurance 2023 (excluding premiums)
- Self paid doctor bills or dentist bills. Nursing home costs (yearly statement) and other health costs which are paid in 2023. If you didn't reach the franchise you have to proof it
- Children: name, date of birth, kind and duration of education/school/studies; official residence
- Payment receipts of your child care costs in 2023 (only until the age of 14)
- Alimony: paid alimony in 2023; child alimony have to be declared separately (copy of separation/divorce convention please enclose)
- Paid AHV contribution 2023 for unemployed persons
- Documents about received lump sum payment(s) in 2023
- Information about your marital status and confession