

Checklist for tax declaration 2023

To fill out your tax declaration / return, we ask you to provide us with all the documents according to the following list:

Please use **NO staples**, your documents are scanned!

General documents / forms

- Original tax return forms (sent by the municipal tax office, DIN A3 folded)
- New costumers: Copy of the last year's tax return, if already received
- Any change in civil status compared to the previous year (details next page)
- Information about children you support financially (details next page)
- Tax certificate of withdrawal from 2nd or 3rd pillar 2023 (lump-sum benefits) (e.g. for purchase of property, start a business, leaving CH and EU/EFTA, case of death, aso.)
- Information about legacies and financial gifts received or given 2023 (statements needed)
- Undistributed legacies (inventory control, account statements, etc.) / worldwide

Income / Switzerland and worldwide

- Salary statement / main and subsidiary income, all of 2023 (if more than one employer) *
* Company car owner: please check, if pos. 15 on your certificate holds information about the percentage of professional use
- Tax certificate of received pensions from AHV or IV, Switzerland or abroad
- Tax certificate for received unemployment benefits/allowance (ALV)
- Tax certificate of social security and insurance daily benefits/allowance from accidents or disease
- Alimonies and annuity contributions paid or received from or paid to separated / divorced spouse and children
- Other income (such as daily benefits, VR fee, fire brigade, private pensions, life insurance aso.), please specify

Deductions / Switzerland and worldwide

- Transportation expenses from home to place of work (train, bus, bicycle, car, aso.) / driven Kilometers
- Confirmation for payments into 2nd/3rd pillar (life insurances) and purchase of pension benefits
- Professionally-related training / retraining, further education cost (paid in 2023), professionally-related
- Schedules, expenses, parking-fees, travel-expenses for advanced training, professionally-related
- Tax certificate health insurance (please ask your insurance company for it, if not yet received)
- Copies of invoices of self-paid health cost, such as dentist or physiotherapy, aso.
- Charitable donations for Swiss registered companies (if overall more than CHF 100.- a year)
- Other deductions (such as non-employed contributions, extraordinary expenses, etc.)

Assets and Debts / Switzerland or worldwide

- Bank account statements as per 31.12.2023 / tax certificates of interest and dividends / closing statements
- US-Accounts: 1099/K-1 statement plus year-end summary overview
- Tax reports for Switzerland of your security deposits (please ask your bank), Switzerland or banks abroad
- Lottery profits, if withholding taxes deducted (original document needed)
- Confirmation of paid interests of debts 2023 (mortgage, private loans, bank loans, credit cards, etc.)
- Car/s & motorbikes & ships (brand, acquisition year, purchase price), Leasing? Yes / No
- Repurchase value of certificates from life and pension insurance (3rd pillar b)

Child care costs

- Child care costs (ask for a tax certification or annual overview), for double-income earners and single parents

Real estate owner / Switzerland and worldwide

- Tax information about rental value of your property (your tax authority will provide a sheet)
- When renting properties: rental income and tenant names, monthly rent (net and gross), specify vacancies
- Maintenance, operational and administrative costs (copies of receipts, invoices, etc.)
- Summary of maintenance, especially for floor owner (ask your property management for it)
- Tax certificate for paid debt interest (mortgage and other, from your bank)

In addition for self-employed

- Balance sheet & income statement 2023, if not done by us
- Documents for all further expenses (such as telephone, mobile, internet, advertising, etc.)

NOTES

changes personal data in comparison to the previous year

(qualifying date: December 31st 2023)

	Person 1 / Husband	Person 2 / Spouse
family/given names	_____	_____
civil status	_____	_____
confession	_____	_____
employer	_____	_____
job title	_____	_____
job location	_____	_____
company car owner: main workplace	_____	_____

further changes in comparison to previous year

birth of a child

family / given name _____

date of birth _____

address
if not similar _____

education	Person 1 / Husband	Person 2 / Spouse
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education/school _____

start - end _____

real estate

purchasing/selling
date _____ price / currency: _____

civil changes (wedding, case of death, divorce, separation)

date of change _____
please attach divorce or separating judgement papers!

information, notes and questions

(such as employer-changes, alimonies, legacy, property maintenance information, questions, need-to-knows, etc.)