

# Documents for the tax return 2023



## base data

Name/first Name

Denomint.

Birth date

Activities

Individual/Husband:

wife:

children:

address:

phone/email:

Refund Account: (Steuer-  
gut-  
haben u. Verrechnungssteuer)

## General tax records

- ☐ Original tax return forms
- ☐ Last final tax assesment
- ☐ Copy of the submitted previous year's tax return (only for new customers)

## Property owner

- ☐ Current tax assesment of the properties (for new purchases or estimates)
- ☐ Receipts/lists of rental/lease income
- ☐ Receipts of property maintenance costs that were submitted in the tax year  
(chimney sweep, building insurance, service subscription, maintenance work, garden maintenance)

## income

- ☐ Wage statement(s) for all main sideline jobs

	Place of Work	%	workload	weekdays
Individual/Husband:	<hr/>	<input type="checkbox"/>	<input type="checkbox"/> Full-Time	<hr/>
	<hr/>		<input type="checkbox"/> Late morning	<hr/>
			<input type="checkbox"/> Afternoon	<hr/>
wife:	<hr/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> Full-Time	<hr/>
	<hr/>		<input type="checkbox"/> Late morning	<hr/>
			<input type="checkbox"/> Afternoon	<hr/>

- ☐ In the case of self employment: balance sheet and income statement or receipts for recording
- ☐ Pension certificate(s), disposals IV
- ☐ Certificates of compensation for loss of earnings and unemployment benefits
- ☐ Supporting documents, separation agreement/divorce convention
- ☐ Interest and balance statements as of December 31, 23 of all bank, postal accounts and other balances
- ☐ Securities custody account statements as of December 31, 23, purchase and sale receipts for securities, interest and Dividend credits, custody fees
- ☐ receipts of lottery winnings
- ☐ Receipts for any sale of valuables (vehicle etc.)

### Deductions from income

- ☐ Interest and balance statements as of December 31, 23 of all debts
- ☐ travel expenses to work
- ☐ Receipts of weekly stays, training costs, member ship fees to professional associations, childcare costs
- ☐ Certificates of personal contributions AHV/IV/EO (self employed or not employed)
- ☐ Certificate of payments into Pillar 2 (pension fund) and Pillar 3a
- ☐ Receipts of alimony and support, separation agreement/divorce convention
- ☐ Receipts of self-paid medical expenses "on a larger scale" (deductible and Franchise health insurance, dentist, glasses etc.)
- ☐ Receipts of donations to charitable institutions and political parties

### Assets

- ☐ Interest and balance certificates for assets and debts at home and abroad
- ☐ Closing certificate, when closing bank accounts or repaying debts
- ☐ Purchase agreement for new acquisition of assets
- ☐ Tax value certificate of life and pension insurances as of December 31, 23
- ☐ Motor vehicles (make, vintage, catalog price)
- ☐ Undistributed inheritances (settlements, tax inventory)
- ☐ Donations and inheritances receive/made
- ☐ Capital payment from insurance and pension