

Documents for the tax return 2023



base data

Name/first Name	Denomint.	Birth date	Activities
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Individual/Husband:

wife:

children:

address:

phone/email:

Refund Account: (Steuerguthaben u. Verrechnungssteuer)

General tax records

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

Property owner

- Current tax assessment 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:		<input type="checkbox"/> Full-Time <input type="checkbox"/> Late morning <input type="checkbox"/> Afternoon	
wife:		<input checked="" type="checkbox"/> Full-Time <input type="checkbox"/> Late morning <input type="checkbox"/> Afternoon	

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, membership 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 received/made
 Capital payment from insurance and pension