

CHECKLIST TAX RETURN

Personal data

Last name	
Address	
Phone	
Email	
Civil status	

	Husband / Single person	Wife
First name		
Date of birth		
Denomination		
Profession		
Employer		
Place of work		
Social security no.		

Minor children or children in basic education that you pay for

First and last name	Date of birth	School or apprenticeship	Expected date of graduation

General

- ☐ All original tax forms 2024
- ☐ Copy of the last tax return filed (with all extra documents)
- ☐ Copies of final tax assessments 2023 and 2022

Income from employment

- ☐ All annual salary statements for both spouses for main occupation, part-time jobs, subsidiary income
- ☐ Received daily allowances, attendance fees, director's fees, wages in kind, tips or others
- ☐ For self-employed person: Summary of income and expenses as well as assets

Compensatory income

- ☐ Confirmations of received annuities / pensions (AHV, IV, pension fund etc.),
- ☐ Confirmations of social security and insurance benefits received (unemployment, illness and accident insurances), children's and family allowances, maternity compensations
- ☐ Alimonies received (proof of payment, divorce conventions)
- ☐ Corona compensation paid out directly

Other income

- ☐ Lump sum settlements / payments (pension fund, insurances), vouchers of payments with description of reason for payment (withdrawal for acquisition of real estate, severance payments, for residual disadvantages)
- ☐ Benefits received from employer not disclosed on annual salary statement (rent for apartment etc.)
- ☐ Income from undistributed inheritances, share in companies and corporations (detailed compilation)
- ☐ Further income

Occupational expenses

- ☐ Transportation expenses from home to place of work (train, bus, bicycle, car etc.)
- ☐ Additional costs for lunch out (restaurant, canteen)
- ☐ Vouchers of other occupational expenses, costs for further training and professional retraining

Other deductions

- ☐ Vouchers regarding charitable donations / membership fees and contribution to political parties
- ☐ Vouchers for payments towards financially supported people
- ☐ Vouchers for alimonies paid to separated or divorced spouse or minor children
- ☐ Vouchers for medical expenses including medication (certificate of health insurance per tax year) and dentist invoices, if not reimbursed by health insurance and if exceeding 5% of the taxable income
- ☐ Information about premiums paid to health care insurances
- ☐ Vouchers regarding the payments for external childcare

Assets

- ☐ Motor vehicles (purchase price and year of purchase)
- ☐ Other assets (cash, gold, other precious metals)
- ☐ Share in undistributed inheritances share in companies and corporations (summary)
- ☐ Received or awarded donations, inheritance advances, inheritances (tax inventory)

Securities and credit balances

- ☐ Statements of interest received and balances as of 31.12.2024 for bank and postal accounts (incl. accounts and deposits settled in 2024) including fortune of minor children
- ☐ Securities account statement as of 31.12.2024
- ☐ Vouchers regarding repayments, acquisitions and sales 2024 of securities
- ☐ Vouchers of dividend and interest income and income from dividends from shares / bonds, respectively tax statement of bank
- ☐ Significant share in corporations, association of individuals
- ☐ Information regarding employee options and shares (if not included in the salary statement)
- ☐ Overview of asset management costs (costs for management of personal property)

Owners of real estate

- ☐ Copy of current tax assessment of real estate (assessment 2009)
- ☐ List of rental income received (overview of lessees)
- ☐ Invoices / vouchers of expenses for maintenance, renovations, operating and administration
- ☐ Annual statement of accounts for owners of apartments / condominium incl. payments to renovation fund

Debts

- ☐ Debts (mortgages, credits, loans) as of 31.12.2024, interest paid on debts in 2024

Insurances

- ☐ Confirmation of 3rd pillar contributions made in 2024
- ☐ Confirmation of additional payments into 2nd pillar account made
- ☐ Confirmation of contributions to AHV / IV (non-employment)
- ☐ Confirmations of repurchase values of life and pension insurances

Notes / further information



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