

Checklist of documents for the Tax Declaration 2023



Dear Clients,

In order to complete your tax declaration, we need the following **documents for the year 2023**:

By signing the **power of attorney on the reverse** of this checklist, you make it easier for us to obtain any documents and vouchers possibly missing.

General

- Copy of the last tax declaration (only new clients)
- Last definitive assessment and important correspondence (decisions on objections)
- Copy of foreign tax declaration, if you are liable for taxation abroad

Forms 1, 2

- What denomination are you? Reformed Rom. Cath. Old Cath. other none
- Do you run your household alone? yes no
- Civil status single married unseparated married separated divorced witted registered partnership
- If you have children, do they live with you? yes no
- Names and date of birth from your children
- Child custody joint custody custody by mother custody by father
- Confirmation of non-local and additional educational costs for your children, child care costs
- Salary certificate for 2023 (own and those of your marriage partner), also extra-cantonal and foreign wage slips
- Pension confirmation or a payment voucher for 2023 (AHV, IV and BVG pensions)
- Vouchers for substituted income (ALV, EO, SUVA, daily benefits, pensions, etc.)
- Alimony or support payments received as well as the name, address and year of birth of the person who paid
- Confirmation of payments into Pillar 3a or voluntary purchases into the pension fund
- Confirmation of payments of capital (pension fund, Pillar 3a, life insurance)

Form 3 (securities)

- Capital and interest statements for all bank and PC accounts as at 31.12.2023 (**also closed accounts**)
- Securities portfolio statements and earnings statements for 2023 (tax values), bank charges
- Bank and other property statements from abroad

Form 4 (vehicles, life insurances, health insurance, debts)

- Vehicle(s): type, purchase price and year
- Life insurances with surrender value (tax value 31.12.2023)
- Life insurances with restitution value
- Health insurance premiums in 2023 including any premium reductions
- Details of the amount of the debt, amortisation and interest payments on all loans and credits in 2023 (mortgages, private loans, tax debts, etc.) (Enclose loan agreements)

Form 5 (maintenance payments, support payments, donations, medical costs)

- Alimony payments made, incl. details of recipient (surname, first name, place of abode) as well as additionally costs paid (for example rents, health insurance, taxes, cost of living etc.) → provable with documents
- Payments to persons in need of support and incapable of gainful employment, provided the amount per person supported amounts to at least CHF 4,600 per fiscal year (**Attention:** Post and bank vouchers are to be included)
- Vouchers of donations to charitable organisations and contributions to political parties
- Vouchers of essential doctors' and dentists' charges you paid yourself, incl. shares of cost assumed (franchise) as well as list of charges retirement or nursing home (**Our tip:** Your health insurance company can provide you with these details)
- Costs incurred because of a disability: Details of costs paid by you yourself (invoice data in 2023)

Form 6 (occupational costs)

- No. of kilometres travelled daily to work Costs, season tickets bus, train etc.
- Meals taken away from home
- Vouchers of further education costs paid by you (school costs and fees, courses, books etc.)
- Vouchers of membership dues in professional associations

Form 7 (land holdings and properties)

- Own rental values or rental income from properties let out
 - Details about rental property left free of charge
 - Real property folio land holdings and properties (official value) as at 31.12.2023
 - Insurance premiums third-party indemnity, glass, water
 - Vouchers property management and caretaker remuneration
 - Property taxes paid
 - Contributions to repair and renovation funds
 - Vouchers of maintenance and renovation works (invoice date in 2023)
 - Properties or apartment abroad / date of buy or sale / copy of contract
 - Photovoltaic and solar thermal systems (copy of invoice)
- } or statements of administrative charges

Form 8 (simple companies, heirs and condominium associations, inheritance, donation)

- Copy of the tax declaration for simple partnerships, community of heirs or owner community and condominium associations (Form 20)
- Inventory of the estate Deed of donation

Form 9

- Details of the financial year 2023

Additional information for persons liable to pay tax in an international relationship:

The entire worldwide income is decisive for taxation in Switzerland.

Therefore (if applicable) we also need the following information:

- Vouchers for income generated abroad (from gainful employment, land holdings and properties, securities, etc.)
- Vouchers for the income generated by the spouse (abroad)
- Vouchers for assets located abroad (bank accounts, land holdings and properties, Investments, etc.)

Also helpful are details about the beginning (e.g. date of moving there or beginning of the gainful employment) and type of relationship to Switzerland (permit for stay, permission to settle, etc.)

Special note for persons whose tax is deducted at source: If the income generated in Switzerland does not exceed CHF 120,000 a year, there is a possibility of voluntarily obtaining a subsequent proper tax assessment. The appropriate application must be submitted to the authorities **by 31 March of the following year at the latest**. In the case of a higher income, a subsequent proper tax assessment is compulsory.

Power of attorney

I / We hereby empower

Surname:

First name:

Street, no.:

Postal code, place:

Telephone:

Email:

the company

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to request all the documents and vouchers in connection with my tax declaration for 2023 from the appropriate institutions and authorities.

Place, date:

Signature: