

Checklist for private tax declaration 2023



The information you have to fill out in the following sections is asked for the individual completion of your tax declaration. On the one hand we need the full declaration of your income, on the other hand it's important to check, if we can make any deductions from your taxes. Your tax declaration also allows you to reclaim your withholding tax.

Particulars 1:

Name	_____	Forename	_____
Address	_____	Postcode / town	_____
Date of birth	_____	Denomination	_____
Civil status	_____	Profession / %	_____
Phone number	_____	E-Mail	_____

Particulars 2:

Name	_____	Forename	_____
Address	_____	Postcode / town	_____
Date of birth	_____	Denomination	_____
Civil status	_____	Profession / %	_____
Phone number	_____	E-Mail	_____

Particulars children:

Forename	Name	Date of birth	School/apprentice trainer	Beginning/End of school
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

Essential events in 2023:

- Move away/influx _____
- Marriage/divorce _____
- Birth child/-ren _____

Tax forms:

- Copy of your last tax declaration (for new customers only)
- Copy of your last tax assessment
- Form set tax declaration 2023

Receipts and detailed statements for 2023:

Income

- Salary certificate (incl. sideline, child allowances, VR fees)
- Pension certificates (AHV, 2. pillar, Suva, foreign pensions)
- Documents self-employment (annual accounts per 31.12.2023)
- Certificates about daily sickness benefits, ALV-daily allowances, other income
- Confirmation of alimony and maintenance payments (received + payed, incl. address)

Name: _____

Deducations

- Travel expenses to work
 - o Workplace _____
 - o Number of days (220) _____
 - o Public transportation / ticket _____
 - o Private vehicle (Km per day) _____
 - o catering abroad _____

Name _____

Rate _____

- Proof of self-paid training costs
- Certificate pillar 3a
- AHV-disposal of AHV- contributions
- Childcare costs
- Donation Receipts / Contributions to political parties

Medical expenses

- Self-paid Medical expenses (Franchise, cost sharing, dentist, optician, medicaments)
- Provide evidence of health insurance premium reductions
- Evidence of disability costs
- All health insurance policies

Debts

- Credit certificates and interest on debt per 31.12.2023
- Mortgage interest certificates per 31.12.2023
- Private debt and interest on debt per 31.12.2023

 Securities / account

- Bank / postal account interest statements + tax registers per 31.12.2023
- Purchase and sales statements of securities
- Evidence of granted loans and other balances

Capital

- Life insurance policies pillar 3B
- BVG identification card
- Vehicles (type, year of purchase, purchase price) _____

Property owner

- Receipts or statements of rental income (excl. heating/utilities)
- Receipts or statements of maintenance expenses (property taxes, building insurance, chimney sweep, replacement costs)
- Copy of the official fair value estimate
- Copy of any purchase / sales contracts
- Insurance policies

Other documents

- Donations / inheritance benefits
- Capital benefits from insurance
- Receipts about supported people
- Unpaid tax bills per 31.12.2023

To fill out your tax declaration properly all the documents have to be complete. Incomplete dossiers can't be edited. With your signature you agree, that all the documents that we asked for are complete.
We're very thankful for your support.

Place, date

Signature
