

# CHECKLIST FOR TAX RETURN 2024

## Personal information

Name, Surname \_\_\_\_\_ Spouse \_\_\_\_\_  
Civil State  single  married  separated  divorced  widowed  concubinage  
Birth date \_\_\_\_\_  
Religion \_\_\_\_\_  
Employer \_\_\_\_\_  
Profession \_\_\_\_\_  
Working place \_\_\_\_\_  
Address \_\_\_\_\_  
Telefon number \_\_\_\_\_ Email: \_\_\_\_\_  
Dependent children:  
Name \_\_\_\_\_ date of birth: \_\_\_\_\_ School \_\_\_\_\_ until \_\_\_\_\_  
Name \_\_\_\_\_ date of birth: \_\_\_\_\_ School \_\_\_\_\_ until \_\_\_\_\_  
Name \_\_\_\_\_ date of birth: \_\_\_\_\_ School \_\_\_\_\_ until \_\_\_\_\_  
Other dependents:  
Name \_\_\_\_\_ Address \_\_\_\_\_ date of birth: \_\_\_\_\_  
Reason for support and relationship:  
\_\_\_\_\_

Support amount per year CHF: \_\_\_\_\_ → enclose receipts of payments

## Documents for the year 2024

- Original Tax Forms 2024 (incl. return envelope)
- Definitive tax assessments and invoices for 2022 or 2023 (if already received)

## World-wide income from employment and self-employment

- Salary/Wage statements (year-to-date statement for 2024)
- Details of your salary statements (showing what kind of allowances you received)
- Self-employed: financial statement or statement of income and expenses
- Attendance fees, daily allowances, income as a member of the management board
- Unpaid interruptions of work in 2024, please state a reason \_\_\_\_\_

## Compensation of income

- AHV/IV-confirmation, pension-payments, annuities
- Unemployment benefits or insurance payments

## Other income

- Alimony/maintenance payments (received or paid), divorce or separation agreement
- Lump-sum compensation (pension fund, Insurance), receipt of payment, reason for payment (property, leaving allowance, golden hand-shake, invalidity)
- Allowances from employer – not listed on the salary statement (housing, living allowance, schooling etc.)
- Income from an undivided inheritance (list, inventory)
- Gift or inheritance in 2024 (inventory)

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## Business/Travel expenses

- Travel expenses to the place of work (train/tram/bus tickets or driving kilometres by car per day)
- External costs for food (Restaurant, Canteen)
- Home office expenses
- Self-paid bills for further education

## Other objective and personal deductions

- Confirmations or list of donations
- Medical expenses (dentist, self-paid costs for health - statement of charges from health insurance)
- Costs for child care (only if both spouses are working)
- Documents for disability costs

## Insurances

- Confirmation of contributions for Pillar 3a (Säule 3a) for 2024
- Confirmation of a buy-in to a pension fund
- Confirmations of surrender values of life insurances as of 31.12.2024
- Premiums of health and accident insurances for 2024

## Bank accounts and investments

- World-wide statements of bank accounts and portfolios as of **31.12.2024 (tax statements)**
- or** Vouchers of purchase, sale, dividend and interest received in 2024
- Information about employee options and shares (if not shown on salary statement)
- Lottery win (Original voucher)

## Real estate

- Official tax value or fair market value (location, address, type)
- List of rental income or deemed rental income
- Invoices/bills or a list of maintenance costs (e.g. renovation, replacement, building insurance)
- Condominium association statements
- Participation of a real estate company
- Copy of contract if you bought or sold real estate in 2024

## Other wealth

- Cash, Gold, other precious metal, ship, collections, jewels etc.
- Information about purchase/sale of vehicles (brand, year and price of purchase)
- Undivided inheritance (statements, tax inventory)

## Debts

- Mortgages, credit-cards, loans, unpaid tax bills as of 31.12.2024
- Statements of debit interest paid in 2024