



## Checklist Tax Declaration 2023

### General documents

- Original tax declaration forms
- Copy of the last Swiss tax assessment as well as a copy of the last Swiss tax return (only new customers)
- Name and birthdate of your child/children and information about education
- For separated/divorced couples: copy of divorce settlement/act of separation

### Income

- Salary certificate(s), certificates of compensation from insurances i.e. for accident, sickness, unemployment benefit.
- Balance sheet, profit and loss statement for persons with self-employment status
- Interest and wealth certificates of all bank accounts as of 31.12.23
- Security bond certificates (shares, obligations, funds etc.) as of 31.12.23

### Deductions from income

- Statements for liabilities and interest paid (mortgages, loans) as of 31.12.23
- Statements for contributions to voluntary 2nd (buy-ins) and 3rd pillar paid in 2023
- Paid health insurance fees in 2023
- List of paid sickness cost (settlements of health insurance)
- Statement/list of payments for illegitimate child/children with name, address and birthdate
- Statement of donations paid in 2023
- Statement of expenses for non-parental supervision of children (only for single parent or double-income family)
- Professional expenses (usually necessary cost for public transport)

### Real Estate/Property

- Official valuation of value and income of real estate/property in Switzerland
- Valuation of real estate abroad
- Invoices for maintenance/refurbishing/replacement of real estate
- Income from rent (tenancy/lease agreement)

### Others

- Cars, boats etc. (purchase date, purchase price, year of manufacturing)
- Statement(s) from life insurances (buy back values)
- Heritage or donations received

### Remarks

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### E-Mail and day time phone number

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