

Checklist Swiss tax return 2023

Please send us the following documents (without staples):

General

- Original forms of the tax return 2023 (when submitted via e-mail/dropbox a copy of the first page of the tax return form 2023 is sufficient)
- For new clients only: copy of the last tax return 2022 (for existing clients: not necessary)
- Date of birth, civil status, religious denomination, profession (incl. spouse)
- Phone number, e-mail and current address in case of further questions
- Workload in %, place of work and information how you go to work: by car or by public transportation
- Name and date of birth of children living with you, expected date of graduation (if divorced: custody)
- Copy of apprenticeship / confirmation of studies of your children, if they are 18 years old or more
- Year-end statements as at 31.12.2023 of all your bank accounts and securities / custody accounts / life insurance(s) 3b showing interests and dividends earned
- Year-end statements as at 31.12.2023 of mortgages and other debts showing interests paid
- Received resp. paid alimony (name and address of divorced spouse; if paid to children: names)
- Cars / motorcycles: brand and model, year of purchase, purchase price

Income

- Salary statement(s) from your employer(s) of both spouses
- Unemployment benefits, social security and insurance benefits (sickness, accident benefits, etc.)
- Annuities, pensions (AHV, IV, Pensionskasse, etc.)

Deductions

- Professional expenses:
 - Transportation expenses from home to place of work: car kilometers per day or ticket costs for public transportation (depending on what you use)
 - Additional costs for weekly stay at place of work (location, rental costs, number of days, etc.)
 - Home office (if required by employer)
- Costs of further training and professional retraining (language courses, etc.)
- Child care (KITA, playgroup, nanny, etc.)
- Health insurance: tax statement or health insurance policy 2023
- Healthcare costs not covered by health insurance (dentist, glasses/contact lenses, etc.)
- Statement 2023 of the payments into pillar 3a or voluntary purchase into the pension fund
- Receipts of charitable donations
- Rental contract (only cantons of Zug, Geneva and Vaud)

Homeowners, self-employed persons

- House/condo: construction year, address, rental value (Eigenmietwert) and tax value (Steuerwert), mortgage interests, maintenance expenses (including copies of the invoices)
- Self-employed persons: financial statements as at 31.12.2023