

CHECKLIST FOR TAX DOCUMENTS

1. Personal Information

- Copy of the previous tax return (if available)
 - Tax form 2024
 - Proof of civil status (e.g., marriage certificate, divorce decree)
 - Birthdates of children and other household members
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2. Income Documents

- Annual salary statements from employers
 - Pension certificates (AHV, IV, pension fund, accident or sickness benefits)
 - Proof of secondary income (e.g., fees, part-time work, tips)
 - Evidence of unemployment benefits (ALV)
 - Documents regarding alimony (received or paid)
 - Certificates of foreign income (if applicable)
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3. Asset Documents

- Bank statements as of December 31 (all accounts, including savings and youth accounts)
 - Securities account statements (including dividend statements)
 - Proof of property ownership (e.g., taxable value, rental value, mortgage interest)
 - Certificates of debts and loans (including interest statements)
 - Evidence of cash or cryptocurrencies
 - Life insurance documents (surrender value)
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4. Deductions (Professional and Personal)

- Proof of professional expenses (e.g., commute, meals, work tools)
 - Continuing education costs (invoices, proofs)
 - Documents for childcare costs (daycare, nanny, after-school care)
 - Receipts for maintenance payments (e.g., alimony)
 - Proof of donations (donation receipts)
 - Receipts for medical and accident expenses not covered by insurance
 - Proof of contributions to charitable organizations
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5. Insurance and Pension

- Certificates for the 3rd pillar (pillar 3a contributions)
 - Pension documents (pension fund, vested benefits accounts)
 - Insurance premiums (health, accident, and life insurance)
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6. Homeownership

- Evidence of mortgage debts (including interest statements)
 - Taxable value and imputed rental value of the property
 - Documents on renovation costs (if deductible)
 - Documents for property maintenance and ancillary costs
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7. Additional Documents

- Receipts for lottery winnings or other extraordinary income
 - Documents on inheritances or gifts
 - Documents on capital gains or losses
 - Tax certificates for foreign accounts or investments
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8. Special Life Situations

- Receipts for moving expenses (if job-related)
 - Proof of stays abroad (e.g., work abroad)
 - Documents on family caregiving situations (e.g., care expenses)
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9. Business Documents (for the Self-Employed)

- Profit and loss statement and balance sheet
 - Receipts for business expenses
 - Documents for business rentals and investments
 - VAT statements
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Note: Please review the checklist carefully. Missing documents can delay the processing. If you have questions or are unsure which documents are required, we are happy to assist you.