

Checklist for your 2022 tax return

I can prepare your tax return quickly and completely if you provide to me the following documents:

- Copy of your last tax return, if we did not complete it.

- Copy of last year's assessments of the Direct Federal Tax and of the State and Municipal taxes, if the tax return was not completed by us or was not subsequently followed up by us, also for properties outside the canton

- Your new tax return forms

- Information about changes in personal data compared to the previous year (new domicile, additional domiciles, new telephone numbers, name of children that were born during the year, etc.)

- In the case of self-employment: list of payments received and of made expenditures (if double entry booking is legally not required); otherwise: annual financial statements with balance sheet and income statement

- Salary statements of 2022 for the main and side-occupational employments

- Certifications regarding EOPs (Employee Ownership Plans [shares or options, etc.])

- Certifications regarding retirement pensions, indemnifications from unemployment, etc.

- Certifications regarding indemnification due to accidents or payments received from the insurance in context inability to work in context with a illness
- Copy of the health insurance policies
- Annual statement of health insurance per person
- Proof of payment into 2nd or 3rd pillar
- Proof of a payout from the 2nd pillar
- Details of other income, such as alimonies, lottery winnings, etc.
- Bank account, securities and custody account statements as at 31.12.2022, in the case of banks - in particular as soon as there are several domestic and/or foreign securities in the custody account - preferably in form of a statements as per 31.12.2022 for the Tax Authorities. Otherwise: bank statements of the balance as per 31.12.2022 including the interest received in 2022
- Professional expenses: receipts for the use of public transportation means
- Bank statements showing existing debt as per December 31st 2022 and the interest incurred and paid on debt in 2022
- Receipts for donations or contributions to political parties
- Evidence of self-paid medical expenses (incl. alternative medicine) / prescribed medicines and remedies / nursing costs / accident costs / dentist's bills / costs for reproductive aids

- Details of assets: car (brand, year of acquisition, purchase price [not for leased vehicles]), pictures, jewelry, precious metals, art, boats, and horses; in particular: Insurance values on these, if insured.

- Copies of existing life insurance policies.

- For property owner (single-family home): Copy of the last assessed value of the property (ies) as determined by the tax authorities, including the notional rental value as determined by the tax authorities.

- For property owner (single-family home): List of maintenance and costs of refurbishing and possibly supporting documents.

- For property owners (multi-family houses): Property financial statements as of 12/31/2022 of the property manager containing last but not least: Address of the properties, list of the tenants, debts (mortgages) and debt interest, living expenses, maintenance and renovation costs.

- In case of heritages and gifts: detailed information on inheritances received or the gifts made or received