

# CHECKLIST TAX RETURN 2024 (Dependents as of 31.12.2024)

Please fill in the checklist below. There are quite a number of detailed questions that enable us to deduct as much as possible costs. Please note that deductions are different at each canton in Switzerland.

Given Name, Surname	<input type="text"/>	Spouse	<input type="text"/>
Address	<input type="text"/>	PLZ / place	<input type="text"/>
Religion	<input type="text"/>	Marital Status	<input type="text"/>
Contact-Tel.no.	<input type="text"/>	E-Mail	<input type="text"/>

Underage children and children of full age who were not gainfully employed on 31.12.2024 due to vocational training/study:

Name	date of birth	type of education <sup>1</sup>	education end date
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

## Incomes 2024 (incl. spouse)

### Pay slips from all employment

(Payslip obligatory)

- pay slip Partner 1 work quota:  %<sup>2</sup>
- pay slip Partner 2 work quota:  %
- annual accounts for independent acquisition

### Certifications

- AHV-/IV-, SUVA or other pensions, benefits of insurances, payment of unemployment funds etc.
- pertaining to private insurances. (incl. surrender value 2024)

### Property

Have you bought/sold a property? Do you have rented property?

- Yes, please enclose the contract. If yes, have
- you made a deposit? CHF
- you applied for a mortgage? CHF
- Yes, for rented properties (please compile a list of all the rental income and enclose all the rental contracts).

### Allowance

Allowance to/from a divorced/separated partner inc. dependent children (please enclose the decree):

Partner amount : CHF  /month

Child amount : CHF  /month

### Further Documents:

- Copy of last year's tax return
- Copy of the last tax-sentence (Veranlagung)
- Original of your tax return for 2024

remarks:

### Work-related expenses:

## Expenses 2024 (incl. spouse)

1. Travel expenses between home and work place.

work place Partner 1:

- Public transportation
- Car
- bicycle

work place Partner 2:

- Public transportation
- Car
- bicycle

2. lunch at workplace?<sup>3</sup>

Partner 1:  no  yes  
 yes, with employer-subsidy

Partner 2:  no  yes  
 yes, with employer-subsidy

3. Other work-related expenses: (receipt obligatory)

- Work-related accommodated costs<sup>4</sup>
- expenses for further education<sup>5</sup>

### Property (receipt obligatory)

- communal costs and standing charges<sup>6</sup>
- Expenses for property (repairs, maintenance for building, insurances)
- communal escrow fund(Erneuerungsfond)<sup>7</sup>
- Mortgage interest

### Other Costs (receipt obligatory)

- Health insurance statement (premium, costs)
- Franchise/Excess (health insurance)
- Statement of life insurance(s) premiums
- AHV/IV/EO-fees<sup>8</sup>
- Donations to charity<sup>9</sup>
- a copy of the rental contract (if renting)<sup>10</sup>
- Child care costs

### Pensions (receipt obligatory)

- 3rd pillar contributions (Säule 3a)
- Additional voluntary purchases into 2nd pillar

### Illness, accident and disability costs

(receipt obligatory)

- Expenses for Optician, dentist
- Annual health insurance statement<sup>11</sup>

Do you suffer from either of these illnesses:<sup>12</sup>

- Diabetes
  - Celiac disease
- (confirmation of the doctor obligatory)

**Care-/nursery-home costs<sup>13</sup>**

- yes, please enclose the bills

**Financial support** (receipt obligatory)

Individuals you financially support:

Given name, Surname, Address:

Date of birth:

Amount Paid:

Type of relationship:

**Worldwide family assets 31.12.2024<sup>14</sup>**

(receipt obligatory)

**Bonds/Shares and other capital investments**

- Bank statement of all the bank accounts held worldwide (incl. Crypto and NFT's)
- tax statements (especially recommended for many securities)
- Investments (please enclose annual accounts)
- gambling winfalls
- life insurance policies
- stocks bonds
- any other capital investments
- asset management cost

**Gift<sup>15</sup>**

- I received a gift from:

- I've made a gift to:

Given name, Surname, Address:

Relationship:

Date of gift:

amount:

**Loan** (please enclose the contract)

- I've granted a loan to
- I've received a loan from

Name, Surname, address:

interest in 2023:

amount outstanding on 31.12.2024

**Inheritance** (copy of inheritance contract)

- I received money from inheritance:

Name, Surname, address of the testator:

Relationship:

Day of death:

amount:

your share:

date probate was granted:

- I'm involved in an undistributed inheritance.

**Liabilities**

- copy of credit card statement
- list with open invoices
- copy mortgage (please enclose bank statement)

**Other assets as of 31.12.2024**

car / motorcycle / boat etc.

brand:

purchase year :

purchase price :

Leasing:  yes  no

brand :

purchase year :

purchase price :

Leasing:  yes  no

**chattels / tangible assets**

(paintings, jewelry, cash, horses etc.)

**Lump-sum payment of pension<sup>16</sup>**

Total amount:

Date:

Paid by:

- 2nd pillar (pension fund)
- 3a pillar (personal provisions)

## **Explanations**

[1] eg. School university college

[2] eg. Part-time 10-90%, full-time 100%

[3] Additional costs for lunch could be deducted.

[4] When you rent an apartment during the week away from your home because of your work, then you could deduct these costs; but excluded hotels.

[5] If you've taken a course for your business education, (eg. Language, coaching etc.) these costs could be deducted.

[6] If you live in a block with a community, communal costs are potentially deductible. If you live in your own house the connection fees for eg. Water, waste water etc. could also be deducted.

[7] When you live in a community there are sometimes contributions for a specific fund reserved for significant renovations. These costs could be deducted.

[8] If you are not working or self-employed, you normally have to pay some AHV-fees. These costs are deductible.

[9] Only certain donations are acceptable, please send us the details and we can check this.

[10] If you live in the canton Zug, part of your monthly rent is deductible. This may also apply to other cantons in the future.

[11] This is a certificate you get at the end of the year from your health insurance (Concordia, CSS, Swica etc.). This confirms the fees and Franchise/excess you've paid during the year.

[12] Only these two conditions are deductible.

[13] If you cover the cost of your own or your parents care/nursing home costs these could be deductible.

[14] We require the bank statements of your family (Partner 1, Partner 2 and children) worldwide. (even when paying taxes in the foreign country) Within the Swiss tax return all assets need to be declared to ascertain your tax rates.

[15] Please state all significant gifts from other parties.

[16] Only applicable if; you have received lump-sum capital from your 2nd or 3rd pillar pension.