



Checklist tax return 2023

Family name, first name: _____

In cohabitation with: _____

Address: _____

Date of birth, civil status, religion: _____

Profession: _____

Employer: _____

Phone / e-mail: _____

Nationality: _____ Permit: B ☐ C ☐ Others: _____

Enclose copy of permit

important documents

☐ Swiss tax forms (**original forms**)

☐ Copy of your last Swiss tax return and last Swiss tax assessment (**only new clients**)

Wife / Life partner:

☐ Family name, date of birth, religion: _____

Children

☐ Family name, first name, date of birth, type and duration of education

Income (husband and wife)

- ☐ salary statement (**please attach a copy**)
- ☐ income from pension fund (**please attach a copy**)
- ☐ other earnings (**please attach a copy**)

Securities and Credit Balances as per 31.12.2023

- ☐ bank statements (incl. accounts abroad) as per 31.12.2023 (**please attach copy of statement**)
- ☐ shares, bonds funds fixed deposits (**please attach copy of tax statements** or copy of buying- & selling statements)
- ☐ dividends / interest (please attach copies)
- ☐ loan granted to: _____ (please attach copy of agreement)

Owner of real estate properties (Switzerland and abroad)

- ☐ Revaluations of properties (imputed rental value and property tax value)
- ☐ Rental income 2023
- ☐ Maintenance and renovation work:
 - ☐ No receipts → please apply a flat rate of 20 % of the imputed rental value
 - ☐ List/receipts of invoices paid in 2023 are enclosed
 - ☐ Final settlement 2023 for condominium owners' associations

Alimony (paid or received)

- ☐ Personal maintenance contributions **received** and maintenance contributions for minor children
- ☐ Maintenance contributions **paid** to children and to the divorced spouse

Work expenses husband / single person

- ☐ place of work: _____
- ☐ costs for annual or monthly public transportation CHF _____
- ☐ if you go to work by car: distance between home and workplace ____km Number of journeys ☐ 2 or ☐ 4 per day
- ☐ Part-time workload in %: _____
- Number of working days per week: _____
- ☐ self-paid costs for education and seminar costs (please attach invoice copy of seminar/course)

Work expenses wife

- ☐ place of work: _____
- ☐ costs for annual or monthly public transportation CHF _____
- ☐ if you go to work by car: distance between home and workplace ____km Number of journeys ☐ 2 or ☐ 4 per day
- ☐ Part-time workload in %: _____
- Number of working days per week: _____
- ☐ self-paid costs for education and seminar costs (please attach invoice copy of seminar/course)

Debts liabilities as per 31.12.2023

- ☐ balance of debts (mortgage, loan, credit etc.) and paid interest of debt (please attach copy of statement)

Other deductions (please mark where applicable)

- ☐ additional payments to 2nd or 3rd pillar (please attach certificate for tax purposes)
- ☐ health insurance premium (please attach certificate for tax purposes)
- ☐ self-paid treatment expenses, e.g. glasses, dentist etc. (please attach copies)
- ☐ certificates of helplessness allowances/premium reductions received (enclose a copy)
- ☐ retirement and nursing home costs (enclose copy of paid bills)
- ☐ child care expenses (please attach a copy)
- ☐ charitable donations or party donations (enclose copies)

Life insurance policies

- Tax values/ surrender values as at 31/12/2023 of all insurance policies

Vehicles

- Vehicles (car/motorbike), year of purchase, purchase price vehicles leased? • No • Yes

Heritages and gifts (please attach voucher of payment/receipt)

☐ Gifts/(undistributed) inheritances received in 2023 on: _____

☐ Gifts/(undistributed) inheritances in 2023 paid on: _____

Family name, first name, address, date of death, degree of kinship, amount:

Others (please mark where applicable)

☐ lottery winnings (please attach statement of profit)

☐ lump-sum benefit e.g. disbursement of pension fund (please attach a copy)

☐ other assets e.g. gold, pictures etc. (please attach receipt)

In order to prepare your Swiss tax return efficiently and in due time, we kindly ask you to read our checklist carefully and to submit the respective documents completely. Thank you very much.

My / our application to Treuhand Catherine Schmid GmbH includes the following services:

☐ preparation of tax return

☐ review of tax assessment

☐ to file objection (if necessary)

signature husband/single person

wife

place/date: _____