

Checklist for individual tax returns 2022

The following information and supporting documents are used to prepare your individual tax return. A full declaration of income as well as maximum recognition of all tax deduction opportunities is important. At the same time, the tax return is used to reclaim withholding tax.

Information and supporting documents on significant events in 2022:

- Departure/arrival (date, new address with telephone number)
- Marriage/divorce (date, copy of divorce decree)
- Birth of (a) child/ren (first name, date)
- Information on the children's education
- Copy of last tax return (unless we are preparing your tax return for the first time)
- Copy of latest tax assessment

Original supporting documents and details for 2022:

Main form

- Salary statements for main occupation and secondary occupation (incl. child benefits and supervisory board earnings)
- AHV and retirement pension certificates
- Sick pay, maternity and unemployment daily allowance and insurance daily allowance certificates
- Confirmation of child support and maintenance payments (incl. the address of the recipient) divided into child and spousal payments (received/paid)
- Pillar 3a certificate
- Occupational benefit plan certificate (purchase contributions)
- AHV decree for AHV contributions of unemployed persons
- Details and supporting documents for donations
- Details and supporting documents for contributions to political parties
- Certificate of the insurance provider on redeemable capital insurances and lump sum investments: Surrender value as at 31/12/2022
- Portfolio of private vehicles: Details of type, year of manufacture, purchase price
- Portfolio and income in respect to undivided inheritances: Copy of schedule of assets and liabilities of an estate schedule/inheritance file
- Further assets (boat, coin collection, precious metals, jewellery, etc.)

Securities schedule

- Bank statements or interest confirmations of all cash accounts as at 31/12/2022
- Closing documents of accounts closed in 2022
- Details of other individual loan balances and interest as at 31/12/2022
- Security and deposit statements as at 2022 or tax schedules (issued at the bank)
- Certificates of Lotto wins (incl. stakes for Lotto, Toto, etc.)

Property schedule

- Rental income, excl. heating and ancillary costs: Details for each individual property
- Property maintenance documents (incl. property taxes, GVA, chimney sweep, replacement costs, etc.):
- Details and supporting documents for each individual property
- Copy of official market value assessment for each individual property; copies of any purchase or sales agreements

Professional expenses

- travel costs 2022 (train pass, kilometres to and from work)
- Details and supporting documents for further education (computer, language courses, etc.)

Debt schedule

- Debt and mortgage interest rate certificates as at 31/12/2022
- Details of other individual debts and debt interest as of 31/12/2022

Insurance schedule / healthcare and accident costs / disability costs

- Life insurance premium and private accident insurance
- Details of health insurance premium (incl. a copy of the 2022 insurance certificate, if possible)
- Supporting documents for health insurance premium reduction 2022
- Details and supporting documents for healthcare costs (excess for health insurance, dental bills, opticians, etc.)
- Details and supporting documents for disability costs, unless they are assumed by third parties. (Type of disability and level of helplessness allowance)

Further information for the tax return

- Capital payment certificates from pillar 3a, pension funds, accident or liability cases
- Supporting documents on any capital payments from life insurances
- Inheritance divisions in 2022 (inheritance division settlement/payment date)
- Endowments/inheritance advancements in 2022

Many thanks for your help in preparing your tax return.