

TAXES – List of documents required for the preparation of your tax return

- Tax return form for the relevant fiscal year (A3 format with control code)
- Tax assessment decision from the previous year (or the year before if not yet received, for new clients only)
- Amount of advance payments made during the relevant year
- Copy of rental contract
- Phone number
- Email address
- Salary certificates (Place of work, Means of transport, Work rate, Number of commuting days per week)
- Unemployment insurance certificates
- Pensions received (Name, first name, date of birth, full address of payer and amount)
- Pension certificates (AVS, LPP, Life annuity)
- Bank or postal statements as of 31.12 of the relevant year
- Complete securities statements (ideally the tax statement)
- PPE statements (maintenance costs during the year + renovation fund balance as of 31.12)
- Lottery winnings
- Approximate value of vehicle(s) as of 31.12 of the relevant year (if leasing, specify)
- Household furniture inventory value (ECA)
- Certificate of medical expenses from health insurance + other medical costs (dentist, alternative medicine, etc.)
- Certificate from health insurance of premiums paid during the relevant year
- Credit card statements as of 31.12 (interest paid + balance)
- Consumer loan statements as of 31.12 (interest paid + balance)
- Childcare expenses (nursery, day mother)
- Certificates for 3rd pillar A (linked) and pillar B (free)
- Proof of support for dependents (from CHF 3'200 per year with name, date of birth, country and relationship)
- Debt collection statement as of 31.12 of the relevant year
- Mortgage statements (interest paid during the year + debt balance as of 31.12)
- Property maintenance costs including property tax for the year
- Donation receipts during the relevant year
- Proof of continuing education expenses (not always deductible)
- Alimony paid during the year (name, date of birth, full address and amount)
- Gift receipts during the year

This list is non-exhaustive. The documents required vary depending on each individual's situation.
