

Documents and information for the tax return

The documents and information to be provided concern the taxpayer(s) and their minor child(ren). Income and assets include those in Switzerland and abroad.

- Invitation to complete the tax return with the statement of advance payments made
- Tax return from the previous year (for new clients only)
- Tax assessment decision from the previous year (for new clients only)
- Salary certificates with appendices, directors' fees, and other remuneration
- Employment rate, days worked from home, and days not worked
- Place of work and means of transport (public transport, car, motorcycle, bicycle)
- Certificate of family allowances if not paid by the employer
- Balance sheet and profit and loss statement if you carry out a self-employed activity
- Other income of all kinds and lottery winnings
- Unemployment certificate, loss-of-income benefits due to illness, accident, or disability
- Pension certificates (1st pillar, 2nd pillar, 3rd pillar)
- Annual health insurance statements (LAMal/supplementary), amount of subsidies received, as well as medical or disability-related expenses directly borne by you
- Certificate (21EDP) of contributions to the 3rd pillar A or buy-in to the 2nd pillar (LPP)
- Status as at 31.12 of your bank and postal accounts, including interest and fees
- Tax statement of securities portfolio or status of investments as at 31.12 with returns
- Details of shares and participations in non-listed companies and beneficiary of a trust
- Status of the PPE renovation fund and amount of loans granted to third parties and related interest
- Cryptocurrencies, precious metals, and cash (status as at 31.12)
- Value of vehicles (excluding leasing), motorcycles, boats, artworks, jewellery, collections
- Surrender value of life insurance policies as at 31.12
- ECA value of your household furniture
- Rental income received from leased real estate (furnished or unfurnished), subsidies received, proceeds from the sale of electricity produced, and other returns
- Property maintenance costs and insurance, PPE statements, property tax, and meters
- Status as at 31.12 of mortgage debts and related interest expenses
- Status as at 31.12 of your various debts and related interest expenses
- Education, further training, or retraining expenses
- AVS contributions for persons without gainful employment
- Childcare expenses
- Amount of your rent excluding charges (for tenants)
- Certificate of indigence and proof of payments for dependents
- Donations and contributions to political parties
- Separation or divorce agreement in the event of payment or receipt of alimony, together with supporting documents for the amounts paid/received during the year
- Donations made/received and inheritances received or not yet divided as at 31.12
- Insurance certificate and/or lump-sum benefits received during the year
- Any other circumstances, documents, and information that may have a tax impact