



## List of documents needed for the preparation of your individual tax return

In order to prepare your tax return, we need the following documents :

- **2023 tax form + account summary showing the amount of provisional installments paid**
- **copy of your 2022 tax return (new clients only)**
- **copy of your 2022 tax assessment (new clients only)**

### INCOME

#### **Employees**

- salary statement(s) + work rate + number of days of home office + means of transport
- family allowances (if children)
- alimony received
- certificate of compensation for loss of earnings received (unemployment, illness, accident, military service)

#### **Retired persons**

- pension statement (AVS + pension)
- other income statements (3<sup>rd</sup> pillar B, ...)

#### **Self-employed individual**

- Annual financial statements (P&L, Balance sheet, enclosures). Other income (alimony, wage,...)

### DEDUCTIONS

- statement of your Swiss 3rd pillar A contribution
- statement showing the cash surrender value of your life insurance policy and amount of premiums paid
- statement of your buy back of missing pension years (LPP)
- alimony paid
- statement of medical charges not reimbursed by insurance
- total amount of health insurance contributions paid
- amount of charitable contribution paid and indication of the beneficiaries
- payments to political parties
- statement of nursery cost for your children aged less than 14 years old by third parties
- statement of professional education not reimbursed by your employer

### WEALTH

#### **Liquid assets (savings accounts, securities,...) – including accounts closed during the year**

- banking and postal statements
- banking statement showing the fiscal value of your securities and amount of dividends received, crypto currency,...
- assets invested in companies (shareholder/associate current account)

#### **Fixed assets (apartment, house, land,... even located abroad)**

- location, value and purchase date, building date, rental value (with related documents)
- if the asset is rented, rental income and costs (maintenance, admin fees,...) with supporting document
- amount of important maintenance costs made during the year

#### **Others**

- statements related to inheritance and/or donations

### DEBTS

- interest summary for banking loans and debt amount
- interest summary for private loans and debt amount
- mortgage interest statement and debt amount
- statement showing the open amount + interest paid on the credit card

Non exhaustive list