

Checklist tax declaration 2023



In order to process your tax return quickly and efficiently I would like to ask you to compile the following documents for me:

General documents

- Original forms of the current tax return (including cover sheet)
- Copy of the last tax return (unless created by us)
- Definite tax assessment of last tax period (if available)
- Residence on 31.12.2022:
- Residence on 31.12.2023:
- In case of marriage in the tax year - Date:
- In case of separation in the tax year - Date:
- In case of divorce in the tax year - Date:
- In case of death in the tax year - Date:

Personal details (for spouses, please fill in per person)

- Name: First given name:
- Street and number: Postcode/Town: /
- Date of birth: AHV-Nr.:
- Marital status: Religion:
- Occupation: Employer / Location: /
- Employment level% Phone / E-Mail /

Minors or children in education (to be completed per child)

- Name: First given name:
- Street and number: Postcode/Town: /
- Date of birth:
- School / Apprenticeship Firm / University / University: (Confirmations mandatory)
- Living in the same household? yes / no

People who you have supported financially

- Name: First given name:
- Street and number: Postcode/Town: /
- Date of birth: Living in the same household? yes / no
- Contribution in the tax year: CHF (Confirmations mandatory)
- Resolutions of the guardianship authority
- Contributions to persons abroad (Confirmations mandatory)

Income

- Wage tax cards about income from main dependent employment
- Wage tax cards about income from side dependent employment
- If self-employment: definitive annual closing (Accounting)
- For participations in simple companies, collective or limited partnerships (please attach the annual accounts and the commercial register extract)
- Confirmation about unemployment benefits
- Pension certificates (disability insurance, retirement pension, pension fund, maternity insurance, etc.)
- Certificate of benefits from health and accident insurance
- Received alimony, or maintenance contributions from the divorced / separated spouse (separation agreement, divorce decree and account statement of the alimony received)
- Certificate of income from maintenance contributions for minor children
- Certificate of lottery company on lottery winnings
- Certificate of income from undistributed inheritances, business and other cooperation shares
- Other revenues (for example from photovoltaic systems, etc.)

Assets

- Bank and interest statements from all bank and postal accounts as per 31.12.2023
- Coupons of accounts offset in the tax year
- Information on shares, funds, bonds, time deposits, etc. (enclose a deposit or tax statement with the related income, purchase and / or sales statements)
- Insurance premium current accounts as per 31.12.2023 including interest certificates
- Life insurance tax certificates
- Interest and capital certificates for condominiums as per 31.12.2023
- Loans as per 31.12.2023 incl. Interest certificates (enclose contract)
- Listing of cash, precious metals, jewellery, stamps, race horses, antiques, etc.
- Information about vehicles (brand, type, purchase price and year / year of purchase - enclose vehicle identification card, if leasing, enclose leasing contract)
- Listing of cryptocurrencies (Bitcoin, Ethereum, Litecoin, Dash, etc.)

Inheritances and donations

- Information on donations received or inherited premiums
Name/first name;/..... Address: Amount: CHF
- Information about inheritances received
Name/first name;/..... Address: Amount: CHF

Real estate (including properties abroad)

- Year of construction, year of purchase, purchase price, address of the property
- For self-inhabited property: land valuation of the cantonal tax administration
- For lent properties: statement of rental income (enclose contracts)
- Invoices and evidence of actual maintenance, repair and administrative costs
- Information about the right to reside (enclose certificate)
- Information about usufruct (enclose certificate)

Professional expenses

- Address Workplace:
- Private vehicle: kilometres (one way) to the place of work (number of days): km / days
- public transport costs (enclose receipts)
- Bicycle
- Company car: yes / no
- Lunch (number of days):
- Canteen meals or lunch checks: yes / no
- Shift work (number of days):
- Self-paid training, further education and retraining costs (enclose invoice copies)
- Additional costs for weekly stays (copy of rental agreement, subscription costs / travel costs of weekly homecoming)
- Other costs necessary for the execution of the profession - Preparation and documentation of the actual costs and justification of their necessity (e.g.: self-paid work clothes upon request of the employer)
- Membership fees for professional associations

Debts

- Interest and capital certificates for mortgages, loans and loans as per 31.12.2023
- Credit cards, small loans, consumer credits (no leasing contracts), taxes owed as well as compensatory interest to the tax office, etc.

Pension Fund (Pillar 2) and Pillar 3a

- Purchase confirmation from the Pension Fund
- Bank and / or insurance confirmations of the deposit in pillar 3a

Insurance premiums

- Health insurance premiums (enclose current policy)
- Details of premium subsidies
- Private accident insurance
- Life and pension insurance as well as their surrender value (tax value according to certificate of insurance company as of 31.12.2023)

Medical expenses

- Certificate from the health insurance company about cost sharing (KVG and VVG)
- Self-paid costs (glasses, contact lenses, hearing aids, dentist's costs, hospital, home stay, disability aids, etc. - minus reimbursement from health insurance company)
- Do you live in a retirement or nursing home Yes / No
(if so, attach monthly bills for home expenses)
- Do you suffer from any of the following diseases:
 - diabetes
 - coeliac disease
 - aphasia

Further deductions

- self-paid contributions to the AHV and accident insurance (if not included in salary statement)
- Donations to recognized institutions (enclose receipts)
- Contributions to political parties (enclose receipts)
- Childcare costs (enclose receipts)
- Rent if living in Canton Zug (enclose copy)

Special - Deductions for expatriates

- Apartment / house abroad (housing costs for own use)
- Relocation costs (enclose receipts)
- Private school tuition costs for underage, foreign-language children at a foreign-language private school (enclose receipts)

Representation in front of the tax office

Do you wish that Köppel-Legal AG receives the power of attorney towards the tax office and that all correspondence will come directly to Köppel-Legal AG in the future? Thus, we have all deadlines for you under control and check orders and invoices for you in advance. This service will cost you more.

yes / no

Remarks

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Recommendation

The tax return must be submitted on time, otherwise an extension of the deadline must be entered. If you wish, we can do this for you. In this case, please indicate this in the order.

Note for new customers

- Please enclose the final assessment 2022 and a copy of the 2022 tax declaration.
- Even with this list it may be that it is not clear what is needed. If it is too time-consuming for you, or if you have questions when compiling the required documents, please contact us, we are happy to help.
- The checklist is also available online www.koeppel-legal.ch/downloads
- Consultation appointment can also be booked online: <https://my.calenso.com/book/koeppel-legal>

Mandate (please mark with an X and submit together with the tax documents):

- Preparation of the tax return.
- Accompanying letter with information on the expected tax burden and, if possible, tips on tax optimisation.
- Application for a new provisional tax calculation for direct federal tax and state tax.
- For general tax advice, I expect you to contact me at to arrange an appointment.
- I will retire in the next few years (maximum 15 years) and would like independent, neutral advice on pension funds (e.g. is it worth buying, advantages and disadvantages, pension or lump sum, etc.). Please contact me to make an appointment at the following telephone number:
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- I would like independent, neutral advice in the area of tax-optimised pension 3a (tied pension), whereby the lump-sum withdrawal(s) should also be tax-optimised. Please contact me to make an appointment at the following telephone number:
- I would like independent, neutral advice on various financial matters (investments, mortgages, pensions, etc.). Please contact me for an appointment at the telephone number
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- Do you have any special wishes?
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Place / Date

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Signature

Of course, we are at your disposal for detailed tax advice. Please do not hesitate to contact us in this regard. We look forward to your call.

Your independent and neutral

Köppel-Legal AG

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Price list

Tax declaration S (small) (30 minutes / approx. 5 enclosures)	from CHF 100.00
Tax declaration M (medium) (1 hour / approx. 10 enclosures)	CHF 200.00
Tax declaration L (large) (1 hour 30 minutes / approx. 15 enclosures)	CHF 300.00
Tax declaration XL (extra-large) (at cost)	CHF 200.00 per hour
Postage	CHF 10.00
Travel compensation for home visits	CHF 150.00 per hour
Surcharge for representation before the tax office	between CHF 100.00 and CHF 300.00 (depending on the complexity of your tax situation)