

TAX RETURN 2022

DOCUMENTS AND GENERAL INFORMATION

Categories	Documents to be provided	<input checked="" type="checkbox"/>
Cantonal and municipal tax (ICC) Direct federal tax (DFI)	Account statement (BVR+)	<input type="checkbox"/>
Address change and date :		
Email address :		
Daytime telephone :		
Notes :		

Categories	Documents to be provided	<input checked="" type="checkbox"/>
Marriage, separation, divorce, birth	Copy of the family record book, separation agreement, divorce decree	<input type="checkbox"/>
Children over 18 years of age	Study certificates	<input type="checkbox"/>
High medical costs	Invoices paid in 2022 or summary of your health insurance	<input type="checkbox"/>
Unpartitioned inheritance	Balance sheet and income statement of the heirs	<input type="checkbox"/>
Shared inheritance	Sharing documents, certificate of inheritance	<input type="checkbox"/>
Lottery winnings	Proof of winnings and bets for the year	<input type="checkbox"/>
Purchase, sale of real estate	Copy of the purchase deed or sale	<input type="checkbox"/>
Childcare expenses	Certificate	<input type="checkbox"/>
AHV Contributions	Invoice of contributions	<input type="checkbox"/>
Voluntary payments (donations)	Certificates or proof of payment	<input type="checkbox"/>
Capital benefits from AHV/IV	Certificate of the fund	<input type="checkbox"/>
Capital benefits from BVG or 3rd pillar A) or B)	Certificate of the pension fund	<input type="checkbox"/>
Taxes	Copy of the previous tax return and the last tax decision	<input type="checkbox"/>
Family allowances	Certificate for family allowances (if not included on the salary certificate)	<input type="checkbox"/>

INFORMATION ON YOUR INCOME

Categories		Documents to be provided	<input checked="" type="checkbox"/>
Employed activity	Main income (spouse)	Salary certificates Activity rate :	<input type="checkbox"/>
	Incidental income (spouse)	Salary certificates Activity rate :	<input type="checkbox"/>
	Professional transport	<input type="checkbox"/> Car <input type="checkbox"/> Bus <input type="checkbox"/> Train <input type="checkbox"/> Bike Kilometers :	<input type="checkbox"/>
	Allowances paid by the employer	Certificates (holidays, births, etc.)	<input type="checkbox"/>
Independent activities	Independent income	Balance sheet and accounts as at 31.12.2022	<input type="checkbox"/>
Loss of earnings benefits	Unemployment and military service	Certificate	<input type="checkbox"/>
	Illness and accidents	Certificate	<input type="checkbox"/>
	Disability insurance	Certificate	<input type="checkbox"/>
Pensions	AHV & IV pensions	Certificate from the fund	<input type="checkbox"/>
	2nd pillar pensions	Certificate of the pension fund	<input type="checkbox"/>
	3rd pillar pensions	Bank or insurance certificate	<input type="checkbox"/>
Insurances	Payment into the 3rd pillar A (OPP3)	Certificate of contributions paid (form 21 EDP)	<input type="checkbox"/>
	Buying back insurance years	Certificate of the pension fund	<input type="checkbox"/>
	Premium subsidies	OVAM decision and insurance certificate for all household members	<input type="checkbox"/>
Other assets	Life insurance	Certificate of insurance	<input type="checkbox"/>
	Household contents insurance policy	Copy of ECA policy	<input type="checkbox"/>
Housing	Housing deduction	Copy of the lease	<input type="checkbox"/>
Real estate	Rents collected	Management account / summary of rents	<input type="checkbox"/>
	Maintenance costs	Paid invoices dated 2022 or management account	<input type="checkbox"/>
	Flat area for own use	Square metres or plan	<input type="checkbox"/>
	Tax valuation of the building	Parcel number(s)	<input type="checkbox"/>
Alimony		Name and address :	
<input type="checkbox"/> Received <input type="checkbox"/> Paid		Amount :	

INFORMATION ON YOUR SECURITIES AND DEBTS

Categories		Documents to be provided	<input checked="" type="checkbox"/>
Status of securities	Bank or postal accounts	Bank or postal certificates	<input type="checkbox"/>
	Securities, bonds, funds, etc.	Tax statements / Interest statement 2022 with balances as at 31.12.2022	<input type="checkbox"/>
	Other		
	Claims	Balance at 31.12.2022 :	<input type="checkbox"/>
Status of debts	Loans	Statements of interest paid in 2022 with balance as at 31.12.2022	<input type="checkbox"/>
	Credit cards		
	Mortgages		
	Other debts and loans (family, friends, etc.)		