

Name: \_\_\_\_\_

First Name: \_\_\_\_\_

Street: \_\_\_\_\_

PLZ, Location: \_\_\_\_\_

Mobile number: \_\_\_\_\_

E-Mail: \_\_\_\_\_

**Order for the preparation of the tax return, tax year 2023**

Enclosed you will find the following documents of the year 2023 (please mark with a cross):

- Original forms of the tax office
- Completed 1st sheet of the tax return with detailed personal/children's information.
- Wage, pension statements (main and secondary occupations, AHV or IV, BVG, SUVA)
- Settlements of daily allowances from health, accident and unemployment insurances
- Financial statements (balance sheet and income statement with notes)
- Interest and capital statements of your bank and postal accounts
- Stock of cryptocurrencies
- List of assets with securities receipts or tax list
- Receipts for loans and credit balances incl. interest statements
- Owner-occupied rental and property tax value of the property (incl. properties abroad)
- Supporting documents for property income/expenses (property statement of administration)
- Professional expenses/travel to work
- Education and training costs (school, travel, meals, teaching materials)
- Mortgage and debt interest vouchers
- Alimony + child support payments and/or divorced/separated spouses
- Health insurance premium, reduction
- Certificates of life insurance and 3rd pillar a, deposit and/or withdrawals
- Certificates of deposits, purchases or withdrawals from the 2nd pillar pension fund
- Contributions to political parties
- Receipts for donations or charitable contributions
- Bills/deductibles Health insurance, dental bills, nursing home costs, Spitex, etc.
- Receipts for childcare costs
- Certificates of tax values of life insurance policies
- Information on motor vehicles (make/year of purchase/year of manufacture/price of purchase)
- Details of other assets (collections etc. / valuables insured?)
- Inheritances and donations

Date: ..... Signature: .....