

TAX RETURN CHECKLIST 2024

- ☐ **Tax Return:** All forms from the tax authorities.
- ☐ **Taxes:** Copy of the last tax return and the last tax assessment.
- ☐ **Personal Information:**

	Person 1	Person 2
Name		
First Name		
Address, Place of Residence		
Marital Status		
Religion		
Date of Birth		
Professionf		
Employment Rate		
Telephone Number(s)		
Email Address(es)		

- ☐ **Single with own household as of 31.12.2024:** yes / no
- ☐ **3rd Pillar / Life Insurance / Pension Fund Contributions (2nd Pillar):** Certificates for 2024.
- ☐ **Children:**

	Child 1	Child 2
First Name		
Tax identification number "ZPV-Nummer"		
Date of Birth		
Lives with me/us		
Name of School		
Expected Graduation Date		
Name/Address of Caregiver		
Name/Address of other Parent (if unmarried or separated)		
Third-party care costs		
Educational expenses		
Child's income		

- ☐ **Income:** Salary statements, proofs of unemployment compensation, received AHV and IV pensions, as well as received alimony (name, first name, address, and year of birth of the paying person), maintenance and support contributions, daily allowance certificates.
- ☐ **Bank/Post:** Capital and interest statements 2024 for all bank accounts, savings books and cash vouchers.
- ☐ **Securities:** Portfolio statements 2024, details of charged fees and taxes.
- ☐ **Vehicles, cash, valuables, collections, etc.:** Purchase price & year.
- ☐ **Capital and annuity insurance (3b):** Evidence of premiums and tax values/redemption values as of 31.12.2024.
- ☐ **Health Insurance:** Tax statement on premiums and self-paid medical expenses.
- ☐ **Private Debts:** Interest statements for 2024, debt balance as of 31.12.2024 (including tax debts).
- ☐ **Political Parties:** Evidence of contributions and donations to parties based in the Canton of Bern.
- ☐ **Alimony Paid, Maintenance, and Support Contributions:** Name, first name, and address of the receiving person, date of birth, relationship, justification, and total amount of contributions paid in 2024 (if applicable, with payment receipts).
- ☐ **Donations:** Evidence of contributions to charitable institutions based in Switzerland in 2024.
- ☐ **Medical expenses:** List of medical, dental and pharmaceutical expenses in 2024 that were not covered by health insurance and were self-paid.
- ☐ **Professional expenses:** place of work, travel expenses, professional literature, education and training, number of working days with days with meals away from home per week, costs of weekly stay away from home, etc.
- ☐ **Real estates:** rental income, property maintenance, property tax, property management, property insurance, base fees for waste and wastewater disposal.
- ☐ **Self-employment:** Financial Statements 2024.
- ☐ **Special:** Shares in collective and simple partnerships/ construction companies and consortia/ inheritances and co-ownership associations/ inheritances/ gifts and advances received or given/ capital payments from the 2nd or 3rd pillar, severance payments, life insurance policies/ disability-related costs/ non-employment-related contributions/ additional benefits/ lottery winnings.

Comments:

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