

## Checklist Tax Return 2025

### Resources

- |                          |                                 |   |
|--------------------------|---------------------------------|---|
| <input type="checkbox"/> | Access code for Tax Return 2025 |   |
| <input type="checkbox"/> | Tax Return 2024                 | Copy  |
| <input type="checkbox"/> | Taxpayer                        | Address, religion (denomination)  |
| <input type="checkbox"/> | Children                        | Name, birthday, receipts for day care fees or other costs in connection with children being cared for by others |

### Income

- |                          |                                     |   |
|--------------------------|-------------------------------------|---|
| <input type="checkbox"/> | Employed individuals                | Salary certificate(s)   |
| <input type="checkbox"/> | Self-employed individuals           | Annual accounts or statement of revenues and expenditures   |
| <input type="checkbox"/> | Senior citizens                     | Statements of pensions and capital benefits such as Old Age and Survivors Insurance / Disability Insurance, pension schemes, and life insurance |
| <input type="checkbox"/> | Unemployed and disabled individuals | Statements of daily allowances from unemployment, accident or health insurance policies   |
| <input type="checkbox"/> | Alimony                             | Details of alimony/maintenance payments   |

### Deductions

- |                          |   |   |
|--------------------------|---|---|
| <input type="checkbox"/> | Employed individuals                    | Travel costs: distance by car (km) or receipt of travel pass (train or bus); proof of payments made to 3 <sup>rd</sup> pillar a) pension scheme or to purchase additional 2 <sup>nd</sup> pillar company pension benefits |
| <input type="checkbox"/> | Alimony                                 | Receipts for alimony/maintenance paid   |
| <input type="checkbox"/> | Support payers                          | Support payments to dependants in need  |
| <input type="checkbox"/> | Disabled and care-dependant individuals | Proof of health care expenses (health insurance deductibles, dentist, ophthalmologist, optician)  |
| <input type="checkbox"/> | Education costs                         | Invoices for continuing education courses   |
| <input type="checkbox"/> | Donors                                  | Proof of financial contributions to charities or political parties  |

### Real estate

- |                          |                            |   |
|--------------------------|----------------------------|---|
| <input type="checkbox"/> | Owner-occupied real estate | Notification by tax office of estimate of taxes payable |
| <input type="checkbox"/> | Rented out real estate     | Rental income   |
| <input type="checkbox"/> | Maintenance and repairs    | Invoices  |

### Other assets

- |                          |                         |  |
|--------------------------|-------------------------|--|
| <input type="checkbox"/> | Securities and deposits | Statements of postal and bank accounts, bonds, fund units, shares or loans; loan agreement for private loans |
| <input type="checkbox"/> | Life insurance policies | Insurance statement or policy  |
| <input type="checkbox"/> | Inheritance and gifts   | Address of deceased/donor, amount and date of inheritance/donation   |
| <input type="checkbox"/> | Motor vehicles          | Make, purchase price, year of purchase   |
| <input type="checkbox"/> | Other property          | Precious metals, collection of paintings, boat, etc.   |

### Liabilities

- |                          |  |   |
|--------------------------|--|---|
| <input type="checkbox"/> | Mortgages, private loans, Loans from private individuals | Statements of creditors showing the amount of the debt per end of year and proof of payment of interest on loan |
|--------------------------|--|---|