

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 rd pillar a) pension scheme or to purchase additional 2 nd 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

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|--------------------------|----------------------------|---|
| <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 |
|--------------------------|--|---|