

Checklist Tax Return 2023

Resources

- Access code for Tax Return 2023
- Tax Return 2022 Copy
- Taxpayer Address, religion (denomination)
- Children Name, birthday, receipts for day care fees or other costs in connection with children being cared for by others

Income

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

Deductions

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

Real estate

- Owner-occupied real estate Notification by tax office of estimate of taxes payable
- Rented out real estate Rental income
- Maintenance and repairs Invoices

Other assets

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

Liabilities

- 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