

Checklist for the Tax Declaration 2022

Last Name / First name: _____

For questions about the tax declaration, you can reach me under: _____

I want an appointment with my consultant

Part1 – List of documents

- Tax Declaration 2022, with cover sheet (ZPV Nr./Registration Nr.), but without guidance!
- Definitive assessment 2021 (if existing)
- Wage statements of all paid activities including payments in cash
- Balance sheets and profit and loss accounts for self-employment
- Daily allowance certificates (Unemployment Insurance Fund, IV, sickness and accident insurance))
- Pension payment receipts AHV/IV, pension and other benefits
- Foreign certificates or additional training costs and costs of childcare for children through a third-party
- Compilation of received or paid alimony
- Certificates of savings, wages, investment, deposit and other accounts
- Evidence of the income from marketable securities (stocks, bonds, mutual funds)
- Evidence for lottery, or PMU pool winnings (Enclose a blue certificate
- Receipts over the costs of managing securities investments and bank accounts
- Statements of paid interest on debt (mortgages, loans, loan)
- Compilation of professional costs (costs of training, meeting, etc.)
- Compilation of rental income and property maintenance
- Certificates of voluntary purchase in the second pillar (pension fund)
- Certificates of deposit into the 3a pillar(private pensions)
- Certificates of surrender values of life insurance
- List of insurance premiums (health insurance, any premium subsidies, accident, life and annuity policies)
- List of medical expenses (if higher than 5% of net income)
- Receipts for donations, professional associations and contributions to political parties

PART 2 – PERSONAL AND ADDITIONAL INFORMATION

a. Personal information (on the 31.12.2022)

Person 1

Do you live alone? Yes / No
Fixnet: _____
Mobile : _____
Email: _____
Date of birth: _____
Religion: _____
Employment rate: _____ %
Workplace: _____
Employer: _____
Profession: _____
Marital Status: _____

Person 2

Fixnet: _____
Mobile: _____
Email: _____
Date of birth: _____
Religion: _____
Employment rate: _____ %
Workplace: _____
Employer: _____
Profession: _____
Marital Status: _____

033 333 20 40 

westberatungszentrum.ch 

sekretariat@westberatungszentrum.ch 

Freienhofgasse 18 
3600 Thun

b. Professional expenses

Person 1

- Public transport / Bike: Abo _____ CHF/Year
 Car: _____ km per Day (Outward and return journey)
 Professional Training costs:
 CHF: _____
 School: _____
 Kind: _____

Person 2

- Public transport / Bike: Abo _____
 Car: _____ km per Day
 Professional Training costs:
 CHF: _____
 School: _____
 Kind: _____

Home office (Person 1 / Person 2)

- Work at Home; Rent CHF _____ / Number of rooms: _____

c. Not leased vehicles

- Brand and Model
 Acquired year
 Purchase price

	Vehicle 1	Vehicle 2	Vehicle 3
	_____ / _____	_____ / _____	_____ / _____
	_____ / _____	_____ / _____	_____ / _____

d. Alimony / Child Support

- Alimony From / To **or** Contribution to support parents / grandparents / siblings
 Last Name / First Name _____
 AHV-Nr. _____
 Date of birth. _____ Address _____
 Amount year 2022 _____ CHF / Degree of relationship: _____

e. Properties (please include receipts)

- Rental value, rental income, official value**, construction year
 Summary of all costs related to maintenance, renovations, conversions, extensions, etc. (Billing date 2022)
 Property taxes, charges (water, sewer, garbage), building insurance

f. Children

- Name and Date of birth:
 Child 1 _____ Child 2 _____
 Child 3 _____ Child 4 _____
 Did you have expenses for child-caring services? _____ / _____ CHF
 Cost for education of your child?
 (Name / Typ/ Amount) _____ / _____ / _____ CHF
 (Name / Typ/ Amount) _____ / _____ / _____ CHF
 (Name / Typ/ Amount) _____ / _____ / _____ CHF

Remarks / Details:

