

Tax return checklist 2025



We need your help to prepare your tax return correctly. Please compile your 2025 tax documents in accordance with this checklist and submit the dossier as early as possible. In any case, please apply for an extension of the deadline. Once the documents are with .gfag for processing, we will take care of any further deadline extensions.

Personal data

| | | | |
|----------------|----------------------|----------------|----------------------|
| Name | <input type="text"/> | Spouse | <input type="text"/> |
| First name | <input type="text"/> | | <input type="text"/> |
| AHV (OASI) no. | <input type="text"/> | AHV (OASI) no. | <input type="text"/> |
| Religion | <input type="text"/> | Religion | <input type="text"/> |
| Date of birth | <input type="text"/> | Date of birth | <input type="text"/> |
| Profession | <input type="text"/> | Profession | <input type="text"/> |
| Address | <input type="text"/> | | |
| Phone private | <input type="text"/> | Phone business | <input type="text"/> |
| Email address | <input type="text"/> | | |

Residential data

Do other adults who do not belong to the family live in the same household? Yes No

Change of residence (tick as appropriate) Yes No

Former address

Children whose maintenance you are responsible for or whose education costs you bear

| First name | Date of birth | School or apprenticeship company | External / apprenticeship costs resp. * | External childcare costs (KITA, day school, etc.) * |
|----------------------|----------------------|----------------------------------|---|---|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |

* Please enclose invoices

General documents

- Original tax return incl. forms & cover sheet (ID code)
- Copy of the last tax return (if not done by us the previous year) and final assessment
- Salary statements for all paid activities (full-time, part-time & secondary employment) including remuneration in kind
- Daily allowance certificates for unemployment benefits
- Compensation for special benefits, commissions, allowances, bonuses, severance pay, etc.
- Pension payment receipts (AHV/IV/BVG/SUVA/health and accident insurance, military insurance)
- Proof of supplementary benefits & incapacity allowance or other non-taxable income
- Compilation of the maintenance contributions received or paid
- Certificates of payments made into pillar 3a or into the 2nd pillar (BVG/pension fund)
- Certificates of surrender values of life and pension insurance policies, one-off deposits
- Insurance premiums (health insurance incl. premium reductions, accident, life and pension insurance)

Assets**a) Bank and postal information**

Salary account, savings books, bank and post balances, fixed-term deposits, etc. (interest certificates as on 31.12.2025)

b) Documents regarding the financial situation

Securities (securities register, evidence of income such as dividends & coupon credits)

Private loans granted, credits (interest 2025, credit balances as on 31.12.2025)

Receipts for the management costs of securities and investments

Receipts for bank fees (account fees, deposit fees, fees for safe deposit box)

Lottery and pools winnings

Other assets such as cash, vehicles, works of art, ships, precious metals, etc.

c) Vehicles

| Make | Type | Purchase year | Purchase price |
|------|------|---------------|----------------|
| | | | |
| | | | |

Information/documents regarding debts and other deductions

Credits, loans, mortgages: interest and capital confirmations as on 31.12.2025

Outstanding invoices as on 31.12.2025 (e.g. 3rd instalment of state and municipal taxes 2025)

Membership fees and donations to political parties (enclose receipts)

Paid alimony/support contributions: List details (name, address, amount) under remarks *

Benefits for persons who are in need of support, unable to work or in need of permanent care: List details (name, address, amount) under remarks

Grants/donations (enclose list)

* Maintenance payments to adult children are not deductible. At most, a (half) child deduction is possible.

Self-paid sickness and accident costs

Among other things costs for doctor, dentist, medication, hospital and health stays, medical treatment/therapy, nursing home (please enclose tariff card), Spitex (home care), dietary meals **less** health insurance benefits. Please enclose copies of invoices or health insurance KVG/VVG tax certificates.

Information/documents regarding professional expenses

Degree of employment _____ % (or working days ____) / spouse: _____ % (or working days ____)

Professional expenses:

- Place of work: _____ / spouse: _____

- Commute by public transport: costs CHF _____ per year

private vehicle: Km per day _____

Education, training and retraining costs (receipts for school costs including books, fees and expenses) *

Weekly residence (enclose copy of rental agreement, list travelling expenses under remarks)

Costs for study/work room: Copy of rental agreement

Membership fees to professional organisations (enclose copies of invoices)

