

## Checklist of documents for the 2023 tax return

	Enclo- sure	Not ap- plicable
<b>BASIC DATA</b>		
Original tax forms received	<input type="checkbox"/>	<input type="checkbox"/>
Tax return from the previous year <i>(unless bepartner ag prepared the tax return in the previous year)</i>	<input type="checkbox"/>	<input type="checkbox"/>
Definitive tax calculations and assessment decision from the previous year <i>(unless bepartner ag has a power of attorney)</i>	<input type="checkbox"/>	<input type="checkbox"/>
<b>CHANGE COMPARED WITH THE PREVIOUS PERIOD</b>		
Change in marital status <i>(marriage, divorce, separation)</i>	<input type="checkbox"/>	<input type="checkbox"/>
Change in religion <i>(joining or withdrawal)</i>	<input type="checkbox"/>	<input type="checkbox"/>
Birth of a child including evidence of any child or childbirth allowances received privately	<input type="checkbox"/>	<input type="checkbox"/>
Changes regarding children receiving training <i>(details of the training including when it will be completed)</i>	<input type="checkbox"/>	<input type="checkbox"/>
<b>INCOME</b>		
2023 salary statements including secondary employment, BoD fees etc. <i>(unless prepared by bepartner ag)</i>	<input type="checkbox"/>	<input type="checkbox"/>
Pension certificates <i>(OASI, IV, pension fund)</i>	<input type="checkbox"/>	<input type="checkbox"/>
Job title (individual/husband: _____/wife: _____)		
Working hours and working days per week: _____ - hours/ _____ days per week		
Alimony and maintenance contributions	<input type="checkbox"/>	<input type="checkbox"/>
Additional income and revenue <i>(life annuities, scholarships, loss of income, etc.)</i>	<input type="checkbox"/>	<input type="checkbox"/>
Lump-sum settlements	<input type="checkbox"/>	<input type="checkbox"/>
Documents regarding self-employment	<input type="checkbox"/>	<input type="checkbox"/>
<b>DEDUCTIONS</b>		
Season ticket costs for public transport (CHF _____ per year)		
Travel costs to workplace (total km per trip: _____, time period: _____)		
Details of shift/night work	<input type="checkbox"/>	<input type="checkbox"/>
Rental agreements where staying away from home during the week	<input type="checkbox"/>	<input type="checkbox"/>
Training and retraining costs	<input type="checkbox"/>	<input type="checkbox"/>
Certification of pillar 3a contributions	<input type="checkbox"/>	<input type="checkbox"/>
Buy-in contributions pillar 2	<input type="checkbox"/>	<input type="checkbox"/>
Health insurance costs and premium composition	<input type="checkbox"/>	<input type="checkbox"/>
Confirmation of premium reduction	<input type="checkbox"/>	<input type="checkbox"/>
Additional self-funded medical, invalidity and care costs	<input type="checkbox"/>	<input type="checkbox"/>
Voluntary contributions <i>(donations and contributions to political parties)</i>	<input type="checkbox"/>	<input type="checkbox"/>
Maintenance contributions to divorced/separated spouses and/or children	<input type="checkbox"/>	<input type="checkbox"/>
Documents regarding third-party childcare costs	<input type="checkbox"/>	<input type="checkbox"/>

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<b>PROPERTIES</b>		
Official estimates/cadastral value <i>(if reassessed)</i>	<input type="checkbox"/>	<input type="checkbox"/>
Documents regarding rental income including ancillary costs <i>(if new rental agreements)</i>	<input type="checkbox"/>	<input type="checkbox"/>
Documents regarding effective maintenance and administration costs <i>(property accounts, invoices, buildings insurance, subscription invoices, household appliances, craftsmen etc.)</i>	<input type="checkbox"/>	<input type="checkbox"/>
Documents regarding the acquisition or sale of properties <i>(contracts of purchase or sale)</i>	<input type="checkbox"/>	<input type="checkbox"/>
Documents regarding investments to save energy <i>(insulation, modern heating, solar, photovoltaics etc.)</i>	<input type="checkbox"/>	<input type="checkbox"/>
Certificates of mortgage interest and capital payments	<input type="checkbox"/>	<input type="checkbox"/>
<b>ASSETS</b>		
Certificates of interest and capital as of 31 December	<input type="checkbox"/>	<input type="checkbox"/>
Securities account and tax statements (securities) as of 31 December	<input type="checkbox"/>	<input type="checkbox"/>
Newly opened or closed accounts <i>(date, certificate of opening or closing from the bank)</i>	<input type="checkbox"/>	<input type="checkbox"/>
Details of cryptocurrencies	<input type="checkbox"/>	<input type="checkbox"/>
Details of the purchase or sale of securities <i>(date, number, purchase/sale price)</i>	<input type="checkbox"/>	<input type="checkbox"/>
Original receipts for lottery winnings	<input type="checkbox"/>	<input type="checkbox"/>
Private motor vehicles <i>(make, year of acquisition, purchase price)</i>	<input type="checkbox"/>	<input type="checkbox"/>
Cash, gold and other precious metals as of 31 December (value in CHF _____)	<input type="checkbox"/>	<input type="checkbox"/>
Other assets	<input type="checkbox"/>	<input type="checkbox"/>
Certificates confirming the surrender values of life insurance policies as of 31 December	<input type="checkbox"/>	<input type="checkbox"/>
Loans receivable including interest and the relevant agreements	<input type="checkbox"/>	<input type="checkbox"/>
Participations in undivided estates <i>(community of heirs questionnaire)</i>	<input type="checkbox"/>	<input type="checkbox"/>
Inheritance and gifts <i>(amount and date)</i>	<input type="checkbox"/>	<input type="checkbox"/>
<b>DEBTS</b>		
Certificates of interest and debt as of 31 December	<input type="checkbox"/>	<input type="checkbox"/>
Private debts (details of creditors, outstanding amount at the end of the year, interest) including agreement	<input type="checkbox"/>	<input type="checkbox"/>
<b>DEVELOPMENTS IN THE 2023 TAX PERIOD</b>		
Compensation received for loss of earnings that is not included in the salary statement	<input type="checkbox"/>	<input type="checkbox"/>
	Yes	No
<b>SUBMISSION OF THE TAX RETURN</b>		
Online submission (without your signature)	<input type="checkbox"/>	<input type="checkbox"/>

## Checklist of documents for the 2023 tax return

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Remarks/notes:

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