B COMPANION

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# B Taxes List of Receipts

Documents for your tax return

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|---|---|---|
| 1. | **Income** | ☐ Wage statement - Lohnausweis<br>☐ Wage statement partner - Lohnausweis Partner<br>☐ Copy of residence permits / IDs for all family members<br>☐ Remuneration from unemployment insurance - RAV Zahlung<br>☐ Receipts of pension from AHV and disability insurance<br>☐ Receipts of pension from retirement fund<br>☐ Receipts of pension from foreign social pension funds |
| 2. | **Assets** | ☐ Bank/post interest statement (as at 31.12, including withholding tax) - Bankkontoauszug 31.12 (alle)<br>☐ Vested benefits account - Freizügigkeitskonto<br>☐ Life insurance (Pillar 3b) |
| 3. | **Property** | ☐ Cadastral or land registry excerpt (if property is abroad: sales contract with purchase price, date of purchase and year of construction)<br>☐ Certificate of mortgage interest and outstanding debt<br>☐ Account proof of rental income (if rented)<br>☐ Evidence of real estate costs (maintenance, insurance premiums and third-party administration) |
| 4. | **Deductions** | ☐ Voucher of debt interest from bank/credit institute<br>☐ Expenses for transport to work<br>☐ Receipts of contributions to AHV - Zahlungen an die AHV<br>☐ Premiums paid to retirement fund - Einzahlung PK<br>☐ Receipts of contributions to Pillar 3a - Einzahlungen 3. Säule<br>☐ Receipts of expenses for external child care - Kita<br>☐ Receipts of medical expenses (dentist included)<br>☐ Legal order of medical insurance premium reduction<br>☐ Receipts of spouse and child alimonies paid<br>☐ Receipts of financial support paid abroad<br>☐ Vocational training costs and German course costs<br>☐ Donations |

All income and assets in Switzerland and abroad must be declared.

## Request a consultation

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