



TAX RETURN 2025

Checklist

Dear Clients

The time has come again - your tax return will soon be due. We are happy to complete it for you. Please ensure your dossier is complete to simplify the process.

Standard rates (in CHF)

Single person	120.-
Married	170.-

Add-ons / special rates (in CHF)

Home ownership per property	35.-
Securities account (per account / bank)	5.- to 80.-
Objection, time-based (per hour)	200.-
Return postage of documents	15.-
Self-employed, main or secondary activity (per hour)	200.-

Please prepare a list of everything that has changed since your last tax return - e.g. number of children, additions/removals of vehicles, purchase of property, home address or commute.

Should we need to request additional documents or information, a surcharge of between CHF 10.- and 200.- will apply for the extra effort.

Important — how to submit

Please send us EVERYTHING in ONE envelope by post. Do not submit anything by e-mail, WhatsApp or similar - documents may only be submitted digitally in agreement with Mr Zwahlen.

Please send as B, A or A-Post-Plus mail (not registered). Registered letters cause approx. 40 min of extra work per item, which will be invoiced.

Required documents

OK

Please use one checklist per tax return.

Copy of last year's tax return, if available

New clients only

☐

Withholding tax

If you are subject to withholding tax, the subsequent ordinary assessment (NOV) must be requested by 31 March. This deadline cannot be extended.

Cover sheet of the tax return with access data

☐

Personal details: date of birth, religious affiliation, e-mail, phone, current address

☐

Person 1: _____

Person 2: _____

Address: _____

New address: _____

All salary statements for the tax year

not the monthly payslips

No. of receipts: _____ ☐

Account statements / interest statements as at 31 Dec of the tax year

No. of receipts: _____ ☐

Portfolio statement / tax certificate from the bank

shares, funds, bonds, cryptos, etc.

No. of receipts: _____ ☐

Pillar 3a statements

No. of receipts: _____ ☐

List of motor vehicles as at 31 Dec

make, model, year of purchase, purchase price, year of manufacture, leasing yes/no

☐

1: _____

2: _____

3: _____

4: _____

Annual statements of all health insurers

incl. accident, billed dental and medical costs, etc.

No. of receipts: _____ ☐

Dated and signed checklist

☐

If available

OK

Loan and debt agreements

No. of receipts: _____ ☐

Receipts for further training / education

incl. travel, specialist literature and accommodation

No. of receipts: _____ ☐

Professional associations

No. of receipts: _____ ☐

Commute details
☐

by car: km per trip; by public transport: ticket/season-ticket cost per year

1: _____

2: _____

3: _____

4: _____

Receipts for donations (charitable or political)

No. of receipts: _____ ☐

If working from home: rental contract and employer confirmation

No. of receipts: _____ ☐

Gifts / advance inheritances / inheritances received or made

No. of receipts: _____ ☐
If you own property

OK

Mortgage statement as at 31 Dec

No. of receipts: _____ ☐

Form 7 or property schedule

No. of receipts: _____ ☐

statement of official value, imputed rental value and purchase price

Receipts for amortisation

No. of receipts: _____ ☐

Renovation and maintenance costs

No. of receipts: _____ ☐
With children

OK

Name, date of birth, religious affiliation, place of residence (if different), name and address of the caring parent (if living apart)

☐

Child 1: _____

Child 2: _____

Child 3: _____

Child 4: _____

Income

No. of receipts: _____ ☐

Childcare costs

No. of receipts: _____ ☐

Education costs

No. of receipts: _____ ☐

Maintenance received / paid

No. of receipts: _____ ☐
If self-employed

OK

Income and expense table with all key items

No. of receipts: _____ ☐

income, rent, OASI (AHV), insurance, travel costs, materials, phone, postage, wages, employee OASI, employee pension fund

Information: _____

If you have any questions, please get in touch with us. Documents not written in German, English or French must be summarised in their key points in German.

Other notes and messages

I / we hereby confirm the completeness and accuracy of the documents and information provided.

Person 1

Surname / first name: _____

Place / date: _____

Signature: _____

Person 2

Surname / first name: _____

Place / date: _____

Signature: _____