

Name :

2023 tax return

If you are salaried, the following information is required. Please fill out one document per person.

1. Income

1.1 Salary income:

- Salary certificate
- Any appendices related
- Tax withheld at source: statement

1.2 Do you hold employee shares or options?

yes no

Did you exercise any employee options?

yes no

If yes ***

1.3 Director's fees: statement

1.4 Full-time/part-time (give % rate):

1.5 Family allowance paid by the social security administration: statement

1.6 Salary loss compensation (unemployment, illness, accident): statement

1.7 Do you frequently travel for professional reasons? Does your employer have foreign subsidiaries or activities? Do you perform your job in several locations? Does your salary include any special components (bonus, shares, and employee options)? If yes ***

*** Please contact us to discuss your situation

Name :

2023 tax return

2. Work-related expenses

2.1.a. Transportation:

- Means of transportation?
- Address of place of work
- Distance from home to place of employment (in km)?
- Price of a train or bus card, if applicable

2.1.b. Meal costs: do you have lunch at home or outside? Is there a canteen at work, or does your employer in any way contribute to your meals (e.g. meal cheques ...)?

2.2 Residence away from your domicile during the week? yes no

- during a time period from..... to..... ; how many work days?
- Rental cost of apartment occupied during the week:
- Travel between domicile and residence away from your domicile:
 - Means of transportation?
 - Address of residence during the week:
 - Distance (in km)
 - Price of a train or bus card, if applicable

2.3 Continued training expenses

Detail of the expenses that are not reimbursed by the employer (copy of invoices), including transportation costs, meal and lodging costs

3. Retirement planning

- Pension buybacks into the mandatory professional retirement plan in Switzerland or abroad (statement)
- Contribution into a voluntary retirement plan (the 3rd pillar A scheme in Switzerland) or abroad (statement)

A deduction is only possible if a valid statement is provided

© 2024 taxadvice ltd liab. co – all right reserved

*** Please contact us to discuss your situation