

Checklist for the 2025 tax return

The following documents must be submitted to complete the tax return:

- Tax return form
 - copy of the last tax return (if not done by us)
 - Last assessment calculation for state and municipal taxes 2024
 - Salary statements/pension confirmations/confirmations of other income*
 - Interest and balance reports of all bank and PC accounts, custody account statements, etc.*
(Balance as of 31.12.2025; certificate of interest and dividends 2025)
 - Confirmation of debt interest and debt balances (mortgages/loans/credits)*
 - Alimony payments of (ex-)spouses/children (receipts or information)*
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We need the following information for processing:

Professional expenses of person 1

For new customers or if there are changes compared to the previous year:

How do you get to work?

- Car Public transport Bicycle
- Costs of public transport (e.g. subscription costs per year SBB) _____
- Car – Place of work: _____ Km per way: _____
- Catering out: Yes No Possibility to eat at a reduced price (canteen etc.) Yes No
- Part-time employees: number of working days per week or year _____
- number of days / months with Home Office in 2025 _____
- copy of rental contract (if more than 8 months Home Office in 2025)

Additional

- Courses Continuing Education: invoices, receipts, information about travel expenses
(car/food/hotel)
- Specialist literature/books: Enclose supporting documents

***Important:** Information/data from abroad is also required.

Professional expenses of person 2

For new customers or if there are changes compared to the previous year:

How do you get to work?

- Car Public transport Bicycle
- Costs of public transport (e.g. subscription costs per year SBB) _____
- By Car: Place of work: _____ Km per way: _____
- Catering out: Yes No
Possibility to eat at a reduced price (canteen etc.) Yes No
- Part-time employees: number of working days per week or year _____
Pensum: _____
- number of days / months with Home Office in 2025 _____
- copy of rental contract (if more than 8 months Home Office in 2025)

- bills for social security contributions for not employed husband/wife 2025

Additional

- Courses Continuing Education: invoices, receipts, information about travel expenses (car/food/hotel)
- Specialist literature/books: Enclose supporting documents

Children in education (Apprenticeship, social year, cantonal school, university, etc.)

Surname, first name, date of birth, school or training company, end of training

Insurance (please enclose appropriate receipts)

- health insurance certificate (if possible, with detailed cost compilation)
- Premium reduction for health insurance (SVA) – amount: _____
- life insurance: Certificate surrender value as of 31 December
- pension insurance: Certificate surrender value as of 31 December
- Pillar 3a: Confirmation of pension contributions

Medical expenses (please enclose appropriate receipts)

- invoices not paid by health insurance
(e.g. dentist, glasses, lenses, doctor, maintenance hearing aids, etc.)
- Invoices from retirement or nursing home

Donation to Non-profit organisations:

- donation receipts (receipts or confirmations from the institutions)

External childcare

(single parents who work – in the case of married parents, if both parents work)

- Receipts for external care (after-school care, nanny, day care center, etc.)
How many times did your kids eat lunch at the childcare facility: _____

Education costs for children

(If the total costs exceed CHF 3'200.00, please attach appropriate receipts)

- Semester fees/material (books, scripts, etc.)
Information about meals out of town, public transport costs and accommodation
- If training costs for apprentices are to be deducted, the apprentice's salary statement is required.
- Information on scholarships received

Vehicles

- In case of changes compared to the previous year
Brand: _____ Purchase price: _____ Date of purchase: _____

Inheritances/Gifts (except to non-profit organizations)

- Receipts or information

If you are the owner of a property:

Property (please enclose appropriate receipts)

- Announcement of the estimate in the event of a new estimate in the last year
- Rental: Rental income including ancillary costs _____,
excluding ancillary costs _____ (possibly detailed list)
- costs of maintenance, renovation, replacement, repairs, etc.
(This list is not exhaustive)
- property tax
- Cantonal buildings insurance
- Private insurance for buildings/water (possibly included in household contents insurance)
- chimney sweep
- combustion control
- Tank Inspection
- Service subscription/repairs (e.g. heating)
- purchases/repairs/service subscriptions larger appliances
(cooking stove, oven, dishwasher, washing machine, tumble dryer, etc.)
- renovations
- Photovoltaic system (subsidy, reimbursement for electricity fed into the grid)
- Repair work (e.g. painter, electrician, plumber, etc.)
- Miscellaneous minor maintenance of house, garden and grounds (Receipts)
- Detailed utility bills for condominiums and payments
to the renovation fund

Important: All Information/data from Switzerland and abroad is required.

Personal data for the tax return

Last name/first name

Date of birth

Marital status

Street/Number

Zip code/city

Telephone

Email

Bank/postal account details

Remarks

Place and date: _____

Signature: _____

Tax returns can be submitted at the following locations:

ACV WILLI Treuhand + Immobilien AG Buchs
Wiedenstrasse 52c / Postfach 147
9470 Buchs
Tel. +41 81 750 58 50
e-mail: tax@acv-willi.ch

ACV WILLI Treuhand + Immobilien AG Mels
Zeughausstrasse 10
8887 Mels
Tel. +41 81 720 06 30
e-mail: tax@acv-willi.ch