

Tax Return 2024 - Order and Questionnaire

	Person 1	Person 2
Title		
Full Name		
Date of birth		
Nationality		
Marital status		
Date of marriage / separation		
Singles only - are you co-habiting?	If yes, please insert name of partner:	
Religious denomination		
Profession		
Current address		
Address as at 31.12.2024 - if different to above		
Address as at 01.01.2024 - if different to above		
No changes to prior year	If no changes, please enter your name and address - date and sign on page 3	
Move to Switzerland (date)		
Departure from Switzerland (date)		
When did you start working in CH		
Type of Residence Permit		
Did you keep dwelling abroad?		
Employer		
Degree of employment		
Part time job weekdays	Mon Tue Wed Thu Fri Sat Sun	Mon Tue Wed Thu Fri Sat Sun
Town and street where you did work		
How did you travel to work		
- Costs of tickets (annual pass)		
- Car/motorcycle: km one way		
- Returning home for lunch?		
Phone		
Mobile phone		
Office phone		
Email		

Children

First name	Last name	Date of birth	School or employer	End of education	Living in same household?	Biological child

Real Estate

Type / Town / Address / Country	Year of purchase	Year of building	Purchase price	Tax or market value	Income from rent (gross)	No. of bedrooms

List of all motor vehicles

Type and Model	Purchase price	Year of purchase	List price	Year of manufacturing	Leasing

Comments

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Required documents (if available)

Copy of your last tax return (if not prepared by Colfina) and final assessment (Einschätzung or Veranlagung) by the revenue. This will be sent back to you once the current return is completed.

Original tax return forms 2024 received from the tax office.

Salary statement(s) for 2024 (annual summary only = Lohnausweis), including addendum for employee participations, if applicable.

Statements for any additional income such as secondary activity.

Costs for education and further education, if paid by yourself.

Confirmation for any income from social security, assurance, pensions etc.

Certifications of interest and balance for all bank accounts, bonds, shares, mortgages, other debts (also tax liabilities and interest on late payment) and assets with earnings for 2024 and balance as on 31/12/24. Also bank accounts for rent deposit have to be declared. This includes foreign assets and crypto currencies.

Statements for support contributions (to persons in need of support, political party or charity organizations).
Costs for children cared for outside of your household (only if both parents are working).

Alimonies paid or received (ex-spouse or children).

Taxable value and income for real estate (notice of assessment - Steuerschätzung) and invoices for maintenance Tax certificates for deposits into a pillar 3A and/or voluntary payments to the pension fund BVG (in addition to the monthly pension fund contributions).

Premium for your health insurance for the whole family (just the figures):

Medical costs which were (all together) higher than 5% of your net income and which were not refunded by any insurance. Details of a disability, diabetes or other illness, which require special treatment or diet; of any of the family members. (In Baselland all medical costs may be offset.)

Life-insurance-policies: insurer, year of issue and maturity, taxable value/surrender value, premium.

Statements for repayments (e.g. life-insurance-policies): payments from pension fund or pillar 3A, other capital payments from providence insurance or inheritances.

Do you have any other taxable assets, or did you pass on assets to someone or did you inherit? Figures for any other not mentioned payments or expenses such as bank charges, custody fees etc.

Please note

All figures and statements are concerning 2024

You are obliged to declare your worldwide income and wealth. You also must report your children's income (except income from work) and wealth unless they have to complete their own return.

How would you like your copy of the tax return? in paper form electronically

Thank you very much for your order and your confidence.

I/we herewith confirm to have provided all necessary information to Colfina Finanz/Treuhand AG and I have received and understood Colfina's Terms and General Conditions.

Place and date

.....
Signature

Geht an / to be submitted to:

Steueramt

Reg.Nr.

Representation valid for tax return 2024 Vertretung gültig für Steuererklärung 2024

In case Colfina Finanz/Treuhand AG shall act as your representative, we kindly ask you to fill in the section below and to sign the form. This only enables us to receive appropriate information from tax office. It does not mean giving power of attorney to us. Please return this form to Colfina Finanz/Treuhand AG, Schupfarterstrasse 7, Postfach, 5074 Eiken. We then will forward it to tax office. Please note, the representation only is in regard of the current tax return.

I/We agree, Colfina shall act as representative. Tax office shall send any correspondence such as tax return forms, final assessments, tax bills and any letters to:
Colfina Finanz/Treuhand AG, Schupfarterstrasse 7, Postfach, 5074 Eiken

Ich/wir bin/sind einverstanden, dass sämtliche Korrespondenz wie Steuererklärungsformulare, Steuerveranlagungen, Steuerrechnungen etc. gesendet werden an:
Colfina Finanz/Treuhand AG, Schupfarterstrasse 7, Postfach, 5074 Eiken

(please enter your name/s)

Place and date

.....
Signature

Online-Tax Return

Various cantons offer on-line filing of the tax return. By signing this form, your tax return will be filed online provided the possibility is offered.

Filing online means tax returns get submitted electronically. In most cases the supporting documents can also be filed electronically.

Data are transmitted by using various safety schemes. One item is a code which you may find on your tax return forms. Tax offices confirm that the procedure is secure.

If you want to use this service, we kindly ask you to sign and to return this form. Thank you.

I/We (please enter your name/s)
agree that Colfina Finanz/Treuhand AG is submitting my/our tax return online.

Place and date

.....
Signature