

# KELLER & PARTNER TREUHAND

To all our customers

Bern, 15<sup>th</sup> of January 2024

## Tax Declaration for 2023

Dear customer,

In early January the tax administration of the Canton Bern will send you by post the tax forms for the 2023 calendar year.

If you would like to authorise us to complete your tax declaration, please send us these forms as soon as possible after having received them.

In addition we will automatically extend the deadline for your tax declaration if needed.

As a reminder, here is the list of the documents that you should bring along to your appointment or submit to us. The list below is not conclusive.

- Annual salary statements 2023
- Certificates of unemployment benefits 2023
- Certificates of daily accident and sickness benefits paid out
- Certificates on pension payments AHV and pension fund 2023
- Contributions to a restricted private savings scheme Pillar 3a and/or buying into an occupational pension fund made in 2023
- Invoices professional training costs paid by yourself (also e.g. textbooks, computers)
- Membership fees in professional associations
- Marketable securities and their revenues in 2023 (possibly tax or custody account statements from your bank)
- Interest statements for all saving accounts incl. closed accounts 2023
- Did you own Bitcoin or any other cryptocurrencies in 2023?
- Do not forget recently opened accounts and loans
- Lottery payouts 2023
- Surrender values of life insurance policies: Please enclose the certificate of the insurance company as at 31.12.2023

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- Self-funded medical expenses if relevant (complete overview from health insurance) and receipts dentists, glasses, drugs etc.
- Health insurance premiums 2023 and information on possible premium reductions
- Existing debts as of 31.12.2023 and debt interest 2023 (please enclose interest and capital statement)
- tax-deductible donation receipts

## **Real Estate Owners:**

- Net rental income 2023 for rented out properties / attics / garages or any other property
- All relevant invoices for maintenance costs in 2023
- Summary of all operating costs 2023
- Property tax and insurance 2023

## **Please provide the below information on a separate sheet:**

- All professional expenses in 2023 and percentage in case part-time employment
- Travel costs for public transport and/or car kilometres
- All inheritances and gifts made or received 2023
- Childcare costs
- Education costs for children 2023
- Membership fees of political parties 2023
- Vehicles: type, car make, year and price of purchase
- Other assets such as cash, precious metals, jewellery, boats, vintage cars, art collections etc.
- Information on paid or received alimony and maintenance contributions 2023
- Financial contributions to relatives or acquaintances
- Any gifts made or received in 2023?
- Are you involved in one or more inheritances?
- Were there any changes in the family circumstances (i.e. marriage, divorce, childbirth)?

For further information please do not hesitate to contact us

Best regards,

Hans Keller  
Managing Director