

# Your 2024 tax return

First name, last name _____	Street _____
Postcode/town _____	Religion _____
Civil status _____	

Under-age children (born between 2007–2024) and adult children who were not employed as at 31.12.2024 because they were undergoing vocational training or studying.

First name	Date of birth	Type of education/training	Duration (from/to)
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

## Income in 2024 including spouse

### Salary certificates including all secondary income

- Salary certificate Husband Working hours: \_\_\_\_\_ %  
 Salary certificate Wife Working hours: \_\_\_\_\_ %

if part-time position

full working days:

- Mo  Tu  We  Th  Fr  Sa  Su

half working days:

- Mo  Tu  We  Th  Fr  Sa  Su

### Certificates

- for AHV/IV (state old-age/invalidity) pensions, SUVA (Swiss National Accident Insurance Fund) pensions, daily allowances, compensation for loss of income, unemployment benefits, annuities (incl. certificate of surrender value 2024)

### Properties (only for home owners)

- No change versus previous year  
 Rental properties (include a list of achieved rental income or rental agreements)

Have you bought and/or sold properties?

- Yes, in the Canton of Zug (include a copy of the purchase contract and state the date you moved in or date of sale)  
 Yes, outside the Canton of Zug (include a copy of the purchase contract, any estimates and state the date you moved in or date of sale)

### Maintenance contributions (include the ruling/agreement)

from/to: \_\_\_\_\_

Amount for partner: \_\_\_\_\_ monthly

Amount for children: \_\_\_\_\_ monthly

## Expenses in 2024 including spouse

### Occupational expenses

- No changes versus previous year
- Travel costs between home and workplace  
 Workplace Husband: \_\_\_\_\_  
Wife: \_\_\_\_\_
  - Price of transport pass for  
Husband: \_\_\_\_\_ Wife: \_\_\_\_\_
  - Bicycle Husband: (Yes/no) \_\_\_\_\_ Wife: (Yes/no) \_\_\_\_\_
  - Car km Husband: \_\_\_\_\_ Wife: \_\_\_\_\_
- Additional expenses for meals outside the home  
Are you obliged to eat outside the home?  
Husband  yes  no Wife  yes  no
  - Other work-related expenses (include receipts)  
 Cost of rented apartment/room (weekly stay)  
 Monthly costs: \_\_\_\_\_  
 Costs for vocational basic and further training: \_\_\_\_\_

### Properties (only for home owners / include receipts)

- Statement of heating/running costs 2024  
 Additional tradesmen's bills 2024  
 Share of renovation fund as at 31.12.2024  
 Debt interest (mortgages)

### Miscellaneous expenses (include receipts)

- Paid health insurance premiums 2024, total: \_\_\_\_\_  
 Premium discount 2024, total: \_\_\_\_\_  
 Premiums for life insurance  
 Personal AHV/IV (disability insurance) and EO (income compensation) contributions for non-gainfully employed persons  
 Donations, allowances and contributions to political parties  
 Tenant: Copy of current rental agreement (ZG)  
 Third-party childcare  
 Consumer loan/credit cards

**Pension** (include documentation)

- Pillar 3a certificates
- Certificates of payments into your occupation pension fund

**Sickness, accident and disability costs**

- Optician, dentist, hearing aids, overview of contributions to health insurance costs 2024 (include receipts)

**Do you suffer from one of the following?**

A flat-rate deduction is no longer possible for diabetes.  
(include receipts for actual additional costs)

- Diabetes
- Coeliac disease
- Aphasia

**Do you live in a retirement or care home?**

- Yes, please include the annual invoice for retirement/care home costs 2024 (to be obtained from the retirement or care home)

**Support** (include receipts)

for a person/persons with no assets supported by you

First name, last name, address: \_\_\_\_\_

Date of birth: \_\_\_\_\_

Annual allowance: (min. CHF 3,400.-) \_\_\_\_\_

Degree of kinship: \_\_\_\_\_

**Assets as at 31.12.2024 (including spouse and under-age children who are dependent on the tax-payer)****Securities and other investments**

- Bank accounts only with Zuger Kantonalbank
- Bank accounts with other banks (include statements and other bank documents)
- Lottery winnings (include original winnings receipt and original receipt of purchased ticket)
- Life and annuity insurance policies and current annuities (include certificate of surrender value)

**Inheritances**

- I have received assets from inheritances.

First name, last name, address of testator: \_\_\_\_\_

Degree of kinship: \_\_\_\_\_ Date of death: \_\_\_\_\_ Amount: \_\_\_\_\_

Your share: \_\_\_\_\_ Date of division of inheritance: \_\_\_\_\_ (include a copy of the inheritance division agreement)

- I was the sole beneficiary of an inheritance (submit a breakdown).

**Gifts**

- I have received gifts.
- I have made gifts.

from/to first name, last name, address: \_\_\_\_\_

Date: \_\_\_\_\_ Amount: \_\_\_\_\_ Degree of kinship: \_\_\_\_\_

**Loan(s)**

- I have granted private loans.
- I have received private loans.

from/to first name, last name, address: \_\_\_\_\_

Status of the loan as at 31.12.2024: \_\_\_\_\_

interest paid/received in 2024: \_\_\_\_\_ (include loan agreement, and interest statement if applicable)

**Other assets as at 31.12.2024**

Car/Motorcycle:

Make: \_\_\_\_\_ Year of purchase: \_\_\_\_\_ Purchase price: \_\_\_\_\_  LeaseMake: \_\_\_\_\_ Year of purchase: \_\_\_\_\_ Purchase price: \_\_\_\_\_  LeaseMake: \_\_\_\_\_ Year of purchase: \_\_\_\_\_ Purchase price: \_\_\_\_\_  Lease

Other assets (collections, works of art, etc.), designation/value: \_\_\_\_\_

**Lump-sum payout from pension scheme** (excl. pension benefits)  Wife  Husband Total amount: \_\_\_\_\_ Date: \_\_\_\_\_ paid by: \_\_\_\_\_ Pillar 2 (e.g. pension fund) Pillar 3a (personal pension)**Comments**

By signing, you explicitly confirm that Zuger Kantonalbank may – in order to prepare the tax return – process certain sensitive personal data pertaining to you pursuant to Art. 5c FADP (See Art. 5d FADP for an explanation of the term “process”). This relates firstly to the processing of religious affiliation data, as you need to state your religion with a view to paying church tax in your tax return. Secondly, Zuger Kantonalbank may process health-related data or data relating to social welfare measures, depending on the circumstances. Whether a person is receiving a disability pension is relevant for determining the tax burden, and social welfare benefits must be declared. Thirdly, it is possible that data relating to political or trade union affiliations or activities will be processed, as contributions to political parties or trade unions can be taken into account in a tax return. Your consent is voluntary and may be revoked at any time by means of written communication to Zuger Kantonalbank. Reference is also made to the Data Privacy Statement of Zuger Kantonalbank.

**Note for new clients:****Please include the definitive tax assessment for 2023 and a copy of the 2023 tax return.**

Telephone (home) \_\_\_\_\_ Telephone number (work) \_\_\_\_\_

Mobile \_\_\_\_\_ E-mail \_\_\_\_\_

Place and date \_\_\_\_\_ Signature \_\_\_\_\_

**Please return the checklist, the original tax return and your documents to us.**