Tax Return Document Checklist

Descrizione

Tax Return Document Checklist

As tax season approaches, it’s essential to prepare the required documentation in a timely and organized manner. Submitting all documents promptly and in full will significantly streamline the preparation and filing process, reduce back-and-forth communication, and help ensure you benefit from all available deductions.

We recommend printing this list (click on the PDF logo above) and using it as a checklist while gathering your documents.

Please contact us if you have any doubts or if your personal or financial situation has changed during the year.

Personal Identification Documents
() Mod. 730 or Mod. Unico from the previous year (include F24 payment forms)
() Copy of your ID or passport
() Tax ID Number (Codice Fiscale)

Medical & Health-Related Expenses
() Pharmacy receipts (with Codice Fiscale and paid by card)
() Invoices for specialist visits and health tickets
() Invoices or receipts for veterinary expenses
() Funeral expenses

Financial and Employment Income
() Bank declaration for loan interest paid
() CUD (Certificazione Unica) for employment or pension income
() Foreign income tax returns and related tax payment documents

Property and Real Estate
() Cadastral report for properties purchased during the year

() Copies of any real estate sales or purchases made during the year

Deductions & Tax Credits
() ENEA Certifications (for energy savings 55% or 65%)
() Invoices and payments for renovation work (50%)
() Invoices for deductions related to furniture and appliances
() Payment confirmations for life insurance
() School tuition payment receipts
() Proof of payments for children's sport activities (for those under 18)
() Receipts for donations to ONLUS (non-profit organizations)

Social Security & Contributions
() Payment proof for social security contributions
() Contributions for domestic service workers (INPS)

Foreign Assets
() Value and description of assets, equity, funds, and accounts held abroad
() Foreign financial availability required for IVAFE/IVIE declarations

Tag

1. Retiring in Italy
2. Self-employed in Italy
3. U.S. citizens
4. Working in Italy

Data
22/10/2026
Data di creazione
10/04/2025