



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

25/08/2026

Data di creazione

10/04/2025