

ENGLISH - List of documents needed
for the establishment of your annual tax return

EACH YEAR :

- 1. EACH YEAR: THE OFFICIAL TAX FORM MENTIONING THE TAXPAYER NUMBER, AS WELL AS:
GENEVA "CODE-DECLARATION" / VAUD "CODE DE CONTROLE" / VALAIS "NUMBER DOSSIER"**
- 2. THE LAST TAX RETURN (if we have not prepared your tax return last year) AS WELL AS THE LAST TAX
ASSESSMENT RECEIVED FROM THE TAX AUTHORITIES**

1 - PERSONAL INFORMATION

- Photocopy of identity card or full names, as well as the date of birth
- Profession exercised
- Nationality
- Certificate of studies for students (if over 18)

2 - PROFESSIONAL INCOME

- Salary certificate
- Attestation-Quittance
- Activity rate
- Unemployment certificate

3- OTHER INCOME

- Certificate or amount of family allowances received
- Amount of alimonies received
- Certificate of AVS / AI received
- Certificate of pension received from the pension plan (LPP or second pillar)
- For independents the profit and loss accounts, as well as the balance sheet
- Other income (housing allowances, etc.)
- Certificate of life annuity received
- Wages received from abroad

4- DEDUCTIONS FROM INCOME

- Health insurance statement showing premiums paid during the year
- Health insurance statement showing the medical expenses not reimbursed by the insurance, as well as invoices for non-reimbursed medical fees (dentist, pharmacy, etc.)
- Certificate of life insurance showing the cash surrender value as per December 31, as well as the premiums paid during the year
- Statement of the contributions paid to 3rd pillar A (Form. EDP-21)
- Statement of purchase of missing years of contributions into the 2nd Pillar (LPP)
- Supporting documents for childcare costs incurred during the year
- Certificates of donations (charity payments made to public institutions)
- Statement or amount of alimonies paid during the year
- Training costs (not reimbursed by your employer)

5- *BANK ACCOUNTS AND INVESTMENTS*

- The bank statements of each account (current, savings, shares, etc.) showing the balance as per December 31, as well as the interest received/paid during the year and the bank fees
- Bank statements of securities and bonds showing the value balance as per December 31, as well as the income (dividends, interest, etc.) received during the year
- Other elements of wealth (unshared inheritance, art, precious metals, car, boat, jewelry, etc.)

6- *REAL ESTATE*

- Wealth: value and date of acquisition of the property, year of construction and date of first occupation (copy of the notary act of purchase or sale, mentioning the date and price)
- Property occupied by the owner: rental value, as well as maintenance and renovation costs, PPE charges (for property located in the canton of Vaud: also the living surface, in sqm)
- Real estate rented by the owner: rents received as well as maintenance and renovation costs, PPE charges

7- *DEBTS*

- The bank statements of mortgage debts indicating the balance as per December 31, and the interest paid during the year
- Bank statements or certificates of other personal debts (credit, loan, Visa, etc.), showing the balance as per December 31, as well as the interest paid during the year

PLEASE NOTE:

In case of arrival or departure to/from Switzerland during the year, the information to be provided with has to cover the period of the year of residence in Switzerland (in the event of a departure: from January 1st, until the departure date. In case of arrival: from the arrival date until December 31)

Your worldwide information (worldwide income and wealth) must be mentioned in your tax return (including foreign bank accounts, real estate abroad, etc.)

Please note that real estate located abroad/in another canton are not taxable in your canton of residency.

FIDAVIA
CONSEIL FISCAL

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