

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 « N° 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**

- Commuting from your domicile to your office (public or private, Km one-way)*
- 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. 21EDP)*
- 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*
- *Autres éléments de fortune (succession non partagée, œuvres d'art, métaux précieux, voiture, bateau, bijoux...)*

## 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.*

**IF SENDING YOUR DOCUMENTS BY POST MAIL, PLEASE DO NOT USE STAPLES**

