

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

- 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

- Copy 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, number of Km one-way)
- Health insurance statement showing the 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), (Form. EDP-21)
- 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.

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

