



PERSONAL INFORMATION AND/OR CHANGES IN SITUATION

- 2024** declaration codes and identifiers
- Copy of the family record book.
- Births, marriages, separations, divorces, etc.
- Changes of addresses, employers
- Annual proof of income for adult children (born before 2007)
- Religion (only if you wish to pay church tax).

CHILDCARE COSTS FOR CHILDREN UNDER 14 YEARS OLD

- Annual proof of payments (Crèche, GIAP, Daycare center, etc.) If more than **CHF 3,000.-** per child / **PLEASE NOTE : *canteen costs are not deductible* .**

SOURCES OF INCOME

- Salary certificate(s) for each of your employers
- Annual unemployment certificate
- Alimony received or other possible income
- Certificate of AVS, AI pension for the year
- OCPA certificate
- Certificate of pensions received, 2nd pillar, etc.
- Family allowances received during the year concerned
- Housing allowances



INCOME DEDUCTIONS

- Certificate of redemption of 2nd pillar year (mentioning the year and amount)
- Certificate of annual pension contribution 3rd Pillar A
- Annual union dues certificate

BANK ACCOUNTS (CURRENT ACCOUNTS, SAVINGS, SECURITIES, ETC.)

- Status of **all** your accounts as of December 31 of the year concerned, both in Switzerland and abroad or tax statement. (**PLEASE NOTE, INCREASE IF MORE THAN 5 ACCOUNTS**)

REAL ESTATE (HOUSE, APARTMENT, LAND, ETC.)

- Notarial deed (purchase or sale) of each real estate property
- If you have rental income, management report or rent collected
- Rental value (established by the tax administration, if in Switzerland)
- Double-sided** housing tax (so good in France)
- Double-sided** property tax (so good in France) / Cadastral value (so good in Italy)
- Household insurance (fire, theft, civil liability, etc.)
- Statements of co-ownership charges AND renovation funds (for the full year)
- Maintenance costs (boiler, swimming pool, gardening costs, etc.)
- Renovation work carried out during the year concerned / **if more than 5 lines of work**, provide us with a summary (date, *amount generated*, *nature of the work*, *name of the company in Excel table form*)



DEBTS

- Annual interest statement for consumer credits
mentioning capital remaining due on December 31 as well as interest paid during the year NO LEASING
- Annual mortgage interest statement
mentioning the capital remaining due on December 31 as well as interest paid during the year
- Certification of interests and debts made to natural or legal persons (agreement on plain paper by the lender)

LIFE INSURANCE

- Annual certificate mentioning the contribution, the surrender value, year of conclusion, year of maturity and the sum insured
- Annual certificate of contribution to the 3rd pillar B / or life insurance, retirement.
(amount of the annual premium (certificate from the bank, insurance, or provident fund))

HEALTH AND COMPLEMENTARY INSURANCE

- LAMAL annual contribution (statement)
- Supplementary annual health contribution (statement)





MEDICAL FEES

- Statement provided by your insurance or supporting documents, mentioning the portion remaining your responsibility (not reimbursed) / **summary table if more than 10 invoices**

PAID ALIMONY

- Full copy of the judgment fixing the pension.
- Annual supporting documents for pensions paid during the year (bank statements)

TRAINING COSTS AT YOUR EXPENSE

- Proof of the amounts paid for the year concerned.

DONATIONS: (ONLY ASSOCIATIONS WITH THEIR HEAD OFFICE IN SWITZERLAND AND RECOGNIZED AS BEING OF PUBLIC UTILITY)

- Annual payment certificate

