



MONNEY CONSEILS SÀRL

Documents to be provided for  
the declaration - Switzerland,  
permit C, permit B with TOU

Personal information and / or changes in circumstances, either :

- 2022 reporting codes and identifiers
- Copy of the family record book .
- Births, marriages, separations, divorces, etc.
- Changes of addresses, employers
- Situation of children (2022-2023 school certificates) for dependent children of full age, as well as proof of their possible income.
- Work stoppages, sickness, unemployment, etc ...
- Religion (only if you want to pay church tax).

Income and deductions

- Salary certificate (s) for each of your employers)
- 2nd pillar year redemption (certificate from the provident fund, justifying the amount redeemed as well as the year).
- 3rd Pillar A annual contribution certificate (form 21 EDP)
- Annual certificate of union dues
- Annual unemployment certificate
- Support payments received or other possible income
- Certificate of the AVS, AI pension for the year
- OCPA certificate, social services
- Certificate of pension funds received, 2nd pillar, etc.



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Bank assets (current accounts, savings, securities, etc.)

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

Real estate (house, apartment, land, etc.)

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



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### Debts:

- Annual statement of interest for consumer loans  
*mentioning the capital remaining due on December 31 as well as the 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*
- Certificate of interest and debts made to natural or legal persons (agreement on plain paper by the lender)

### Other income:

- Family allowances received during the year concerned
- Housing allowances

### Life Insurance:

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



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### Health and supplementary insurance:

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

### Medical fees:

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

### Paid alimony:

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

### Childcare costs for children under 14:

- Annual proof of payments (Crèche, GIAP, Day center, etc.) / *canteen costs are not deductible.*

### Training costs at your expense:

- Supporting documents for the amounts paid in the year in question.

### Donations:

(only associations having their registered office in Switzerland and recognized as being of public utility)

- Annual payment certificate