

Personal information and/or changes

- 2025** Declaration Codes and Identifiers
- Personal information form to be completed (attached or on www.monneyconseils.ch)
- Copy of the family record book.
- Annual income of the partner or ex-partner if custody is shared
- Annual proof of income for adult children (born before 2007)
- Religion *(only if you wish to pay church tax)*

Childcare fees for children under 14 years old

- Annual proof of payments (Nursery, GIAP, etc.), if more than CHF 3,000. -/ child

WARNING: canteen fees are not deductible.

Sources of income

- Salary certificate(s) and/or receipt(s) for each of your employers
- Annual unemployment certificate
- Certificate of AVS/AI pension for the year
- OCPA Certificate
- Certificates from pension funds received, 2nd pillar, etc.
- Housing allowances
- Alimony received or other potential income





Income deductions

- Certificate of 2nd Pillar buy back
- Certificate of annual contribution 3rd Pillar A
- Annual certificate of union dues

Bank accounts

- Statement of your accounts as of December 31st of the year in question, both in Switzerland and abroad. ***PLEASE NOTE: a surcharge applies if you have more than 5 accounts.***
- Annual statement of bank charges (account maintenance, etc.)

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

- Notarial deed (purchase or sale) of each property
- If you have rental income, management reports or rents collected
- Rental value (as established by the tax authorities, if located in Switzerland)
- Fonciere tax AND habitation tax **front and back** (if located in France)
- Home insurance (fire, theft, civil liability...)
- Condominium fees statements AND renovation fund statements (for the full year)
- Maintenance costs (boiler, swimming pool, gardening costs...)
- Renovation work carried out **only during the year in question**
(If more than 5 lines of work, please provide us with a summary (date, amount incurred, nature of work, name of the company in the form of an Excel table)



DECLARATION SWISS, PERMIS C - B + TOU

Debts

- Annual mortgage loan statement(s)
mentioning the interest paid during the year as well as the remaining capital due on December 31st
- Annual consumer loan certificate(s)
mentioning the interest paid during the year as well as the remaining principal due on December 31st - NO LEASING
- Certificate(s) of interest and debts owed to individuals or legal entities
(agreement on plain paper by the lender)

Other income

- Family allowances received during the year in question

Life Insurance

- Annual statement indicating the premium, surrender value, year of inception, year of expiry and the sum insured
- Annual statement of contributions to Pillar 3B / or life insurance, retirement savings plan.
(annual premium amount / statement from the bank, insurance company or pension fund)





DECLARATION SWISS, PERMIS C - B + TOU

Health insurance and mutual insurance companies

- LAMAL annual contribution (annual statement)
- Annual supplementary health insurance premium (annual statement)

Medical fees (at your expense)

- Annual statement provided by your insurance company or supporting documents (invoices, receipts).
Summary Excel table if there are more than 10 invoices or receipts.

Alimony payments

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

Training fees (at your expense)

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

Donations

(Associations headquartered in Switzerland and recognized as being of public benefit)

- Annual payment certificate

