

# DECLARATION SWISS, PERMIS C - B + TOU

## Personal information and/or changes

- ☐ **2025** Declaration Codes and Identifiers
- ☐ Personal information form to be completed (attached or on [www.monneyconseils.ch](http://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

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## 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)*

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## 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)*

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## 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