



Personal information

- 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

Income and deductions

- Salary certificate(s) and/or Attestation-quittance(s)
(for each of your employers)
- Annual unemployment certificate (Switzerland) or Pôle emploi (France)
- Alimony received or other potential income
- Certificate of buy back 2nd Pillar
- Annual statement of your 3rd Pillar A pension contributions
- Annual certificate of union dues



Bank 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
- Fonciere tax bill (**front and back**) for second homes
- Habitation tax form (**front and back**) for primary and secondary residences
- Home insurance (fire, theft, civil liability, etc.) / if rental income, non-occupant owner insurance (for each property)
- Annual statements of condominium fees/charges
- Maintenance costs (e.g., boiler, chimney sweeping, 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)

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)
*showing the interest paid during the year and the outstanding principal as of 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 borrower's insurance certificate *(for each loan)*
- Annual certificate of contribution to the 3rd pillar B / or life insurance, retirement.

Health insurance and mutual insurance companies

- Annual statement of contributions to LAMAL/CMU, URSSAF or CNTFS
- Annual statement of supplementary health insurance (mutual) contributions





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 (invoices) .

Donations

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

- Annual payment certificate

