

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