



TAX QUESTIONNAIRE

Personal details

**Tax payer 1**

**Tax payer 2**

LAST NAME	.....	.....
FIRST NAME	.....	.....
DATE OF BIRTH	.....	.....
CELL PHONE NUMBER	.....	.....
E-MAIL ADDRESS	.....	.....

Dependent children

LAST NAME	FIRST NAME	ANNUAL INCOME
.....	.....	.....
.....	.....	.....
.....	.....	.....
.....	.....	.....
.....	.....	.....

Other dependent persons (except your spouse or children)

LAST/FIRST NAME	RELATIONSHIP	RESIDENCY
.....	.....	.....
.....	.....	.....

Financial support of the year ..... (Supporting documents ?)

How would you like to receive your tax return (strike out what it does not fit) ?

1. By PDF file (notification by internet to the tax authorities after your review) ;
2. Hard copy by post.

**Please provide us with the following documents or information related to your personal situation (spouse and minor children included) for all your worldwide incomes and assets.**

- Tax declaration form or tax identifier
- Statement of the provisional instalments paid for the fiscal year
- Salary certificate (main and accessory activity as employee, director's fees, etc.)
- What is your employment rate? If part-time, please specify the working days concerned
- How do you get to work (public transportation, motorcycle, car, other)?  
(taxpayer 1..... taxpayer 2 .....) )
- Certificate of family allowances if not paid by your employer
- Certificate of insurance pensions (unemployment, sickness, accident, disability, etc.)
- Certificate of 1<sup>st</sup>, 2<sup>nd</sup> and 3<sup>rd</sup> pillar pensions
- Income statement and balance sheet if you are self-employed
- Separation or divorce agreement if an alimony is paid (proof of the payment included)
- Statement of the health insurance premiums paid during the year
- Statement of the Swiss 3<sup>rd</sup> pillar contribution
- Statement of the purchase of contribution years for the 2<sup>nd</sup> pillar
- Statement of the childcare costs (day nursery, etc.)
- Statement for costs of professional reconversion or improvement
- Bank/postal statements as of December 31 or at the date of their closing
- Statement of lottery gains
- Do you hold unquoted shares (excluding those of bank statement)? If so, please provide us with the financial statement, the number and percentage of shares held and the amount of the dividend received
- Amount of the gross rental incomes of your real estate and the bills related to the maintenance costs (insurance, renovation, etc.)
- Statement of your mortgage or personal loans as of December 31 and the related debtor interests
- Statement of the AVS premiums paid by the non-active persons
- Value of your personal car as of December 31 (if leasing CHF 0.-) : CHF .....
- Value of your collections, jewellery, cash and other valuables as of December 31 : CHF .....
- Statement of the surrender value of your 3<sup>rd</sup> pillar insurances as of December 31
- Copy of your residential lease agreement
- Statement of your health insurance premiums and of the medical expenses at your charge
- Statement of charitable donations to tax exempt organisations
- Did you make or receive donations from/to member of your family or third party? If so, please provide us with the supporting documents
- Did you participate in an estate during the fiscal year? If so, please provide us with the supporting documents
- Did you receive a lump sum of an insurance? If so, please provide us with the supporting documents
- Other relevant information? .....
- **Your N-1 tax return and the related tax assessment**