

## Personal information

Surname :

Family status :

First name :

Address :

Spouse surname :

Spouse first name:

Date(s) of birth: Mr. \_\_/\_\_/\_\_ Mrs \_\_/\_\_/\_\_ Child(ren) \_\_/\_\_/\_\_ \_\_/\_\_/\_\_ \_\_/\_\_/\_\_

Nationality : Mr. \_\_\_\_\_ Mrs \_\_\_\_\_

Occupation :

Spouse occupation :

Work interruptions :

Child(ren) over 18 years old / students : Common household with parents – YES / NO

Changes in your situation during 2015:

## Supporting documents to provide depending on your situation:

- Copy of your last filed tax return and/or notified tax bills

### Income & deductions

- Salary certificate(s)
- Annex to the salary certificate (equities)
- Certificate(s) of pension (retirement, disability, military,..)
- Certificate(s) of unemployment
- Certificate(s) of family allowances received
- Evidence(s) of alimony received (with copy of deed)
- P&L/Balance sheet for self-employed
- Certificate(s) of interest/dividends received
- Evidence of rental income received, questionnaire of/proof of official deemed rental
- Health/Accident insurance contributions or detailed amounts paid
- Evidence(s) of any other income (subletting, subsidies, incidental income, lottery,...)
- Certificate(s) of 2<sup>nd</sup> pillar/buy-back
- Certificate(s) of 3rd pillar contribution
- Evidence(s) of other professional expenses or contributions
- Evidence(s) of professional improvement/career change expenses
- Child car expenses (child less than 14 years old)\*
- Evidence(s) of alimony paid (with copy of deed)
- Certificate(s) of bank fees
- Certificate(s) of debts/mortgage interests paid
- Evidence(s) of donations
- Maintenance expenses, costs bills or summary prepared by an architect
- Medical fees bills or detailed amounts at your own charge
- Evidence(s) of any other deductions (handicap expenses, incidental expenses,...)

*\*Only when both spouses are working, one-parent family and upon proof of evidence.*

### Wealth & deductions

- Certificate(s) of life insurance, with surrender value, if any
- Certificate(s) of bank/securities/investments (with balances or values at December 31)
- Certificate(s) of debts (with outstanding balances at December 31)
- Purchase/sale deed for new or former real estate owners<sup>1)</sup>
- Purchase value and date of car/bike/boat bought within the last 5 years
- Paintings, precious metals value, if more than CHF 2,000
- Evidence(s) of any other wealth information (undistributed inheritance,)

<sup>1)</sup> For any real estate bought during the year, please provide the complete address, the date of purchase as well as the date of building or last renovation, the share and the purchase price or official fiscal value.

**Remarks:**

For arrival/departure to/from Switzerland, the above information should be provided only for the Swiss residence period (a departure attestation and/or copy of the residence permit is requested) – Example: from Jan. 1st to departure date or from arrival date to Dec. 31st).

**WATCH OUT:** Information has to be provided WORLDWIDE (e.g. : foreign accounts, real estate located abroad,..).