



## List of documents needed for the preparation of your individual tax return

In order to prepare your tax return, we need the following documents :

- **2019 tax return with account summary**
- **copy of your 2018 tax return**
- **copy of your 2018 tax assessments (for cantonal, communal and federal taxes)**

### INCOME

#### **Employees**

- salary statement(s)
- family allowances (if children)
- alimony received
- unemployment statement

#### **Retired persons**

- pension statement (AVS + pension)
- other income statements (3<sup>rd</sup> pillar B, ...)

#### **Self-employed individual**

- Annual financial statements (P&L, Balance sheet, enclosures). Other income (alimony, wage,...)

### DEDUCTIONS

- statement of your Swiss 3rd pillar contribution
- statement showing the cash surrender value of your life insurance policy and amount of premiums paid
- statement of your buy back of missing pension years (LPP)
- alimony paid
- statement of medical charges not reimbursed by insurance
- total amount of sickness insurance contribution (for Geneva only)
- amount of charitable contribution paid and indication of the beneficiaries
- payments to political parties
- statement of nursery cost for your children aged less than 12 years old by third parties
- statement of professional education not reimbursed by your employer

### WEALTH

#### **Liquid assets (savings accounts, securities,...)**

- banking and postal statements
- banking statement showing the fiscal value of your securities and amount of dividends received

#### **Fixed assets (apartment, house, land,... even located abroad)**

- location, value and purchase date, building date, rental value (with related documents)
- if the asset is rented, rental income and costs (maintenance, admin fees,...) with supporting document
- amount of important maintenance costs made during the year

### DEBTS

- interest summary for banking loans and debt amount
- interest summary for private loans and debt amount
- mortgage interest statement and debt amount

Non exhaustive list