

## How to send us your file?

1. You can scan your file and send it to us by e-mail **in one PDF file and in order of the check-list** to the email address [info@gva-conseils.ch](mailto:info@gva-conseils.ch)
2. You can send us the copies of your documents in order of the check-list by mail to the following address. **Only the copies, the documents will be scanned and destroyed.**  

Esplanade de Pont-Rouge 2, 1212 Grand-Lancy
3. You can directly deposit your file in order of the check-list at our reception according to the opening hours  
(from 8:45 AM to 12 AM and from 13h45 PM to 18 PM every day of the week)

## Procedure

1. We receive your file (with your identifiers for the tax declaration)
2. We prepare your tax declaration from 30 to 60 days
3. We will contact you to arrange an appointment for the signature of your tax declaration and the payment of our fees

## Fees

*To be paid on site on the day of the appointment*

<b>Single</b> CHF 130.- -----	<b>Married</b> CHF 170.- -----
 + CHF 30.- <b>with</b> child(ren)	 + CHF 50.- per each property

## Extra-Fees

- + CHF 50.- in EXPRESS only on request (done in less than 7 business days)
- + CHF 50.- the spouse works as an independent
- + CHF 50.- for each additional property
- + CHF 5.- copies package (max. 50 sheets)

N.B.: Each advisor reserves the right to modify the fee amount at any time based on the time dedicated to the services.

*\*all our prices are shown exclusive of tax*

**To be filled out only by new clients**

**General Information**

	Taxpayer A	Taxpayer B
Full Name		
Date of Birth		
Adress		
Phone Number		
E-mail		

**Family Situation**

Number of children under 25 years old :	
Annual income of each child less than 24 000 CHF ?	Child 1: CHF _____ Child 2: CHF _____ Child 3: CHF _____
Net worth of each child less than 80 000 CHF ?	Child 1: CHF _____ Child 2: CHF _____ Child 3: CHF _____
Marital statuts :	<input type="checkbox"/> Single <input type="checkbox"/> Cohabiting <input type="checkbox"/> Married <input type="checkbox"/> Divorced <input type="checkbox"/> Separated
Type of custody for children	Number of children in full custody : _____ Number of children in shared custody : _____
Alimony payments ?	<input type="checkbox"/> Paid <input type="checkbox"/> Received Amount : _____
Did you move to or leave Geneva during the year ?	<input type="checkbox"/> Departure <input type="checkbox"/> Arrival Date : _____
Did you file a tax return in Geneva last year ?	<input type="checkbox"/> Yes <input type="checkbox"/> No (If yes, please provide a copy)

**Information on Real Estate Assets**

Number of properties owned ?	
Are your properties rented out ?	<input type="checkbox"/> Yes <input type="checkbox"/> No
If yes, what is the applicable tax regime ?	Individual, Corporation, SCI, SCS, SNC, non-resident, other (specify)
Additional details :	_____

**Income from Businesses and Activites**

Are you shareholder of a company ?	<input type="checkbox"/> Yes <input type="checkbox"/> No In which country ? _____
If yes, name of the company ?	
Do you receive income related to this company ?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Types of income and annual amounts	- Salary : CHF _____ - Dividends : CHF _____ - Other (specify) : CHF _____

**Other Income**

Did you receive unemployment benefits ?	In Switzerland : CHF _____ Other : _____
Do you receive disability of health-related pensions ?	<input type="checkbox"/> Yes <input type="checkbox"/> No
If yes, annual amount of the pension	
County of origin of the pension	
Country where the pension is taxed	

## CHECK-LIST REFERENCES

1. Single – no real estate – without children
2. Single – no real estate – with children
3. Single – real estate owner – without children
4. Single – real estate owner – with children
5. Married – no real estate – without children
6. Married – no real estate – with children
7. Married – real estate owner – without children
8. Married – real estate owner – with children

Our checklists are available online at the following link: <http://gva-conseils.ch>

**CHECK-LIST**

**SINGLE (DIVORCED/SEPARATE/WIDOWED/CONCUBINAGE)**

**NO REAL ESTATE – NO CHILDREN**

**DOCUMENTS**

Please respect this order

- |     |   |                          |
|-----|---|--------------------------|
| 1.  | Tax declaration and/or registration ID's ( <i>numéro de contribuable</i> and <i>code declaration</i> )  | <input type="checkbox"/> |
| 2.  | Salary certificate  | <input type="checkbox"/> |
| 3.  | 3 <sup>rd</sup> pillar A certificate and/or 2 <sup>nd</sup> pillar buyout   | <input type="checkbox"/> |
| 4.  | Union dues  | <input type="checkbox"/> |
| 5.  | Wealth statement at 31 December (Switzerland and abroad)<br>- Bank accounts, stocks, bonds, dividends, cryptocurrencies, lottery winnings, etc. | <input type="checkbox"/> |
| 6.  | Bank account maintenance fees   | <input type="checkbox"/> |
| 7.  | Unsecured interests   | <input type="checkbox"/> |
| 8.  | Other income (eg: unemployment allowances, rental income, family allowances, annuities, etc.)   | <input type="checkbox"/> |
| 9.  | Life insurances premiums and/or 3 <sup>rd</sup> pillar B certificate  | <input type="checkbox"/> |
| 10. | Annual health insurance premiums (LaMal and complementary policies)   | <input type="checkbox"/> |
| 11. | Medical expenses not reimbursed by health insurance (invoices, <a href="#">form to complete</a> )   | <input type="checkbox"/> |
| 12. | Training, upgrading, retraining or reintegration expenses (for professional purpose only)   | <input type="checkbox"/> |
| 13. | Donations (organizations headquartered in Switzerland only)   | <input type="checkbox"/> |

**INFORMATION & SUPPORTING**

- If you are divorced, do you receive or pay any pension?
  - If yes, what amount? (divorce decree)

**UNNECESSARY DOCUMENTS (DO NOT SEND US)**

Monthly payslips, public transport tickets, toll tickets, year-round bank statement, copy of work permit or passport, parking space invoice, internet printing of your itinerary, pension certificate.

**CHECK-LIST**

**SINGLE (DIVORCED/SEPARATE/WIDOWED/CONCUBINAGE)**

**NO REAL ESTATE – WITH CHILDREN**

**DOCUMENTS**

- Please respect this order
1. Tax declaration and/or registration ID's (*numéro de contribuable* and *code déclaration*)
  2. Salary certificate (you and your spouse)
  3. 3<sup>rd</sup> pillar A certificate and/or 2<sup>nd</sup> pillar buyout (you and your spouse)
  4. Union dues
  5. Wealth statement at 31 December (Switzerland and abroad) 
    - Bank accounts, stocks, bonds, dividends, cryptocurrencies, lottery winnings, etc.
  6. Bank account maintenance fees
  7. Unsecured interests
  8. Other income (eg: unemployment allowances, rental income, family allowances, annuities, etc.)
  9. Life insurances premiums and/or 3<sup>rd</sup> pillar B certificate
  10. Annual health insurance premiums (LaMal and complementary policies)
  11. Medical expenses not reimbursed by health insurance (invoices, [form to complete](#))
  12. Training, upgrading, retraining or reintegration expenses (for professional purpose only)
  13. Donations (organizations headquartered in Switzerland only)
  14. Childcare expenses (invoices or bills)

**INFORMATION & SUPPORTING**

- If you are divorced, do you receive or pay any pension?
  - If yes, what amount? (divorce decree)
  - If not, do you have an alternate custody or are you a single parent?
- If you are living with your partner (*concubinage*), is your income higher than that his/hers?
  - If yes, please bring his/hers salary certificate
- Do you have a major child under study during the year?
  - If yes, please bring a study certification

**UNNECESSARY DOCUMENTS (DO NOT SEND US)**

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**CHECK-LIST**

**SINGLE (DIVORCED/SEPARATE/WIDOWED/CONCUBINAGE)**

**REAL ESTATE OWNER – NO CHILDREN**

**DOCUMENTS**

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4. Union dues
5. Wealth statement at 31 December (Switzerland and abroad)   
- Bank accounts, stocks, bonds, dividends, cryptocurrencies, lottery winnings, etc.
6. Bank account maintenance fees
7. Copy of the notarial deed of your property   
- Only if purchases or sold during the year or if you are a new client
8. Questionnaire of the annual gross rental value of your property
9. Maintenance costs of the property ([cf. notice N°1/2022](#))   
- Maintenance or energy saving invoices – [table to be completed](#)
10. Unsecured and/or mortgage interests   
- Summary or annual certificate. Amortization table not allowed.
11. Mortgage insurance premiums
12. Other income (eg: unemployment allowances, rental income, family allowances, annuities, etc.)
13. Life insurances premiums and/or 3<sup>rd</sup> pillar B certificate
14. Annual health insurance premiums (LaMal and complementary policies)
15. Medical expenses not reimbursed by health insurance (invoices, [form to complete](#))
16. Training, upgrading, retraining or reintegration expenses (for professional purpose only)
17. Donations (organizations headquartered in Switzerland only)

**INFORMATION & SUPPORTING**

- Year of construction and date of occupancy of your property?
- If you are divorced, do you receive or pay any pension?
  - If yes, what amount? (divorce decree)

**UNNECESSARY DOCUMENTS (DO NOT SEND US)**

Monthly payslips, public transport tickets, toll tickets, year-round bank statement, copy of work permit or passport, parking space invoice, internet printing of your itinerary, pension certificate.

**CHECK-LIST**

**SINGLE (DIVORCED/SEPARATE/WIDOWED/CONCUBINAGE)**

**REAL ESTATE OWNER– WITH CHILDREN**

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17. Donations (organizations headquartered in Switzerland only)
18. Childcare expenses (invoices or bills)

**INFORMATION & SUPPORTING**

- If you are divorced, do you receive or pay any pension?
  - If yes, what amount? (divorce decree)
  - If not, do you have an alternate custody or are you a single parent?
- If you are living with your partner (*concubinage*), is your income higher than that his/hers?
  - If yes, please bring his/hers salary certificate
- Do you have a major child under study during the year?
  - If yes, please bring a study certification

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Monthly payslips, public transport tickets, toll tickets, year-round bank statement, copy of work permit or passport, parking space invoice, internet printing of your itinerary, pension certificate.

**CHECK-LIST**

**MARRIED – NO REAL ESTATE – NO CHILDREN**

**DOCUMENTS**

Please respect this order

- |     |   |                          |
|-----|---|--------------------------|
| 1.  | Tax declaration and/or registration ID's ( <i>numéro de contribuable</i> and <i>code déclaration</i> )  | <input type="checkbox"/> |
| 2.  | Salary certificate (you and your spouse)  | <input type="checkbox"/> |
| 3.  | 3 <sup>rd</sup> pillar A certificate and/or 2 <sup>nd</sup> pillar buyout (you and your spouse)   | <input type="checkbox"/> |
| 4.  | Union dues  | <input type="checkbox"/> |
| 5.  | Wealth statement at 31 December (Switzerland and abroad)<br>- Bank accounts, stocks, bonds, dividends, cryptocurrencies, lottery winnings, etc. | <input type="checkbox"/> |
| 6.  | Bank account maintenance fees   | <input type="checkbox"/> |
| 7.  | Unsecured interests   | <input type="checkbox"/> |
| 8.  | Other income (eg: unemployment allowances, rental income, family allowances, annuities, etc.)   | <input type="checkbox"/> |
| 9.  | Life insurances premiums and/or 3 <sup>rd</sup> pillar B certificate  | <input type="checkbox"/> |
| 10. | Annual health insurance premiums (LaMal and complementary policies)   | <input type="checkbox"/> |
| 11. | Medical expenses not reimbursed by health insurance (invoices, <a href="#">form to complete</a> )   | <input type="checkbox"/> |
| 12. | Training, upgrading, retraining or reintegration expenses (for professional purpose only)   | <input type="checkbox"/> |
| 13. | Donations (organizations headquartered in Switzerland only)   | <input type="checkbox"/> |

**INFORMATION & SUPPORTING**

- If you are divorced and remarried, do you receive or pay any pension?
  - If yes, what amount? (divorce decree)

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**MARRIED – NO REAL ESTATE – WITH CHILDREN**

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**INFORMATION & SUPPORTING**

- If you are divorced and remarried, do you receive or pay any pension?
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- Do you have a major child under study during the year?
  - If yes, please bring a study certification

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**INFORMATION & SUPPORTING**

- Year of construction and date of occupancy of your property?
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