

## **PERSONALIZED EVALUATION FOR QUASI-RESIDENT / TAXATION ORDINAIRE ULTERIEURE (TOU)**

Below you will find eight checklists that will help you gather all the necessary documents to evaluate your tax situation. Please note that the result of our analysis will be relative to the documents provided on the day of the evaluation.

**For the day of the appointment, please file the documents in the order of appearance of the checklist corresponding to your personal situation.**

IMPORTANT !!!

THE ONE AND ONLY CONDITION TO OBTAIN THE STATUS OF QUASI-RESIDENT / TAXATION ORDINAIRE ULTERIEURE (TOU)  
**IS TO HAVE AT LEAST 90% TAXABLE INCOME IN SWITZERLAND FOR THE FISCAL YEAR**

An Excel table is available on the « Etat de Genève » website to help you determine your eligibility :  
<http://www.ge.ch/>


### **Procedure**


1. You make an appointment (maximum 30 minutes) by telephone or using the following link: [make an appointment](#)
2. Bring all your documents in the order shown in the checklist  
Les horaires s'étendent de 9h à 12h et de 13h30 à 18h
3. We send you our analysis report with the results

*Fees to be paid on site on the day of the appointment*

### **Fees**

**Single** .....CHF 80.-  
**Married**.....CHF 100.-

 + CHF 20.- **with** child(ren)

 + CHF 20.- per property

 + CHF 50.- for remote assessment

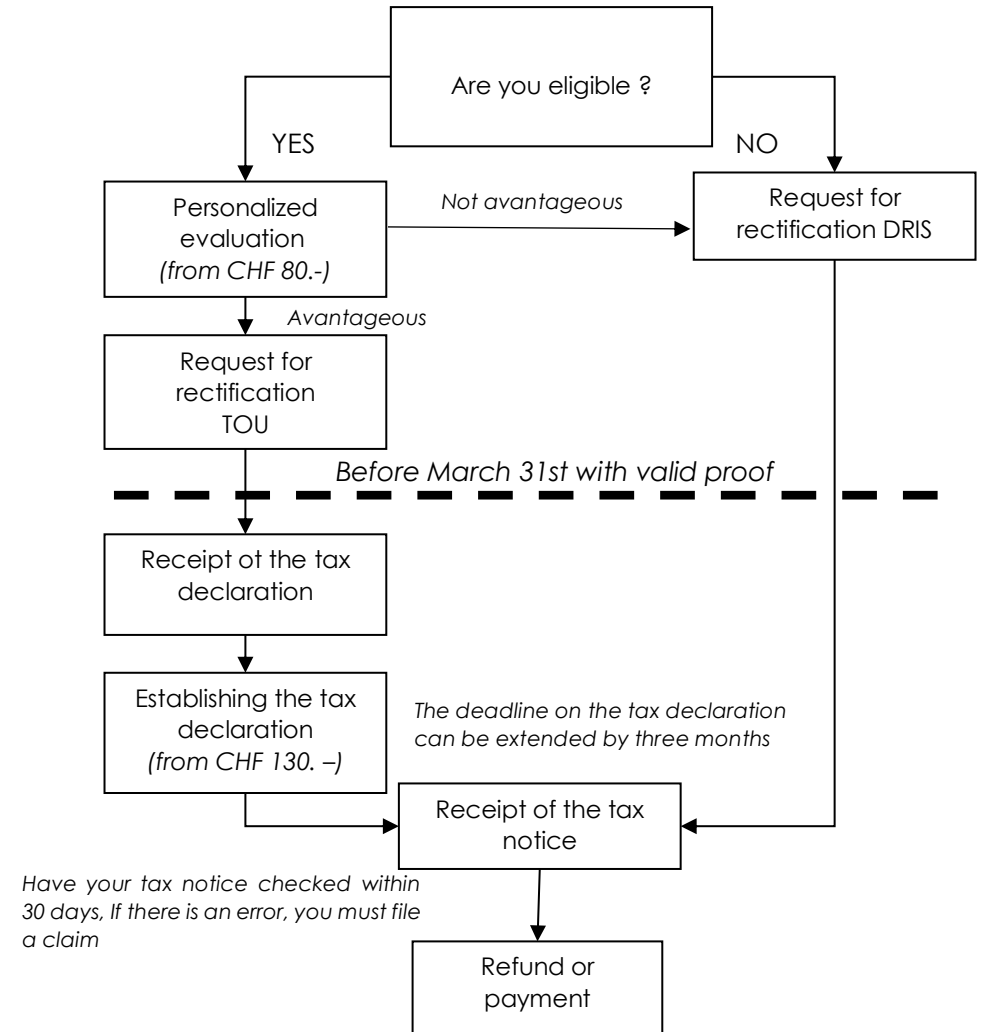
**CHF 70.- LUMP SUM IF YOU ARE NOT ELIGIBLE**

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*

### REFERENCES CHECK-LIST

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



**Annex :**

	In Euros (€)	In Swiss francs (CHF)
Total bank fees		
Total medical expenses (at your expense only)		
Total property maintenance costs (Renovation and/or energy saving)		
Total childcare costs (do not mention canteen costs)		

*Please enter the amounts in their original currency. Your advisor will make the necessary conversions.*

**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. Unsecured interests  | <input type="checkbox"/> |
| 6. Other income (eg: unemployment allowances, rental income, family allowances, annuities, etc.)          | <input type="checkbox"/> |
| 7. Life insurances premiums and/or 3 <sup>rd</sup> pillar B certificate                                   | <input type="checkbox"/> |
| 8. Annual health insurance premiums (LaMal and complementary policies)                                    | <input type="checkbox"/> |
| 9. Medical expenses not reimbursed by health insurance (invoices, <u>form to complete</u> )               | <input type="checkbox"/> |
| 10. Training, upgrading, retraining or reintegration expenses (for professional purpose only)             | <input type="checkbox"/> |
| 11. 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
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|---|--------------------------|
| 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. Unsecured interests  | <input type="checkbox"/> |
| 6. Other income (eg: unemployment allowances, rental income, family allowances, annuities, etc.)          | <input type="checkbox"/> |
| 7. Life insurances premiums and/or 3 <sup>rd</sup> pillar B certificate                                   | <input type="checkbox"/> |
| 8. Annual health insurance premiums (LaMal and complementary policies)                                    | <input type="checkbox"/> |
| 9. Medical expenses not reimbursed by health insurance (invoices, <u>form to complete</u> )               | <input type="checkbox"/> |
| 10. Training, upgrading, retraining or reintegration expenses (for professional purpose only)             | <input type="checkbox"/> |
| 11. Donations (organizations headquartered in Switzerland only)   | <input type="checkbox"/> |
| 12. Childcare expenses (invoices or bills)  | <input type="checkbox"/> |

**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)**

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.

**DOCUMENTS**

Please respect this order

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|-----|--|--------------------------|
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| 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.  | Copy of the notarial deed of your property<br>- Only if purchases or sold during the year or if you are a new client | <input type="checkbox"/> |
| 6.  | “Taxe d’habitation” (only for second homes and properties rented out for only part of the year)                      | <input type="checkbox"/> |
| 7.  | “Taxe foncière”, front and back, condominium fees, multirisk home insurance  | <input type="checkbox"/> |
| 8.  | Maintenance costs of the property ( <a href="#">cf. notice N°1/2022</a> )<br>- Maintenance or energy saving invoices | <input type="checkbox"/> |
| 9.  | Unsecured and/or mortgage interests<br>- Summary or annual certificate. Amortization table not allowed.              | <input type="checkbox"/> |
| 10. | Mortgage insurance premiums  | <input type="checkbox"/> |
| 11. | Other income (eg: unemployment allowances, rental income, family allowances, annuities, etc.)                        | <input type="checkbox"/> |
| 12. | Life insurances premiums and/or 3 <sup>rd</sup> pillar B certificate   | <input type="checkbox"/> |
| 13. | Annual health insurance premiums (LaMal and complementary policies)  | <input type="checkbox"/> |
| 14. | Medical expenses not reimbursed by health insurance (invoices, <a href="#">form to complete</a> )                    | <input type="checkbox"/> |
| 15. | Training, upgrading, retraining or reintegration expenses (for professional purpose only)                            | <input type="checkbox"/> |
| 16. | Donations (organizations headquartered in Switzerland only)  | <input type="checkbox"/> |

**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.

**DOCUMENTS**

Please respect this order

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|-----|--|--------------------------|
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| 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.  | "Taxe d'habitation" (only for second homes and properties rented out for only part of the year)        | <input type="checkbox"/> |
| 6.  | "Taxe foncière", front and back, condominium fees, multirisk home insurance                            | <input type="checkbox"/> |
| 7.  | Maintenance costs of the property ( <a href="#">cf. notice N°1/2022</a> )                              | <input type="checkbox"/> |
|     | - Maintenance or energy saving invoices  |                          |
| 8.  | Unsecured and/or mortgage interests  | <input type="checkbox"/> |
|     | - Summary or annual certificate. Amortization table not allowed.                                       |                          |
| 9.  | Mortgage insurance premiums  | <input type="checkbox"/> |
| 10. | Other income (eg: unemployment allowances, rental income, family allowances, annuities, etc.)          | <input type="checkbox"/> |
| 11. | Life insurances premiums and/or 3 <sup>rd</sup> pillar B certificate                                   | <input type="checkbox"/> |
| 12. | Annual health insurance premiums (LaMal and complementary policies)                                    | <input type="checkbox"/> |
| 13. | Medical expenses not reimbursed by health insurance (invoices, <a href="#">form to complete</a> )      | <input type="checkbox"/> |
| 14. | Training, upgrading, retraining or reintegration expenses (for professional purpose only)              | <input type="checkbox"/> |
| 15. | Donations (organizations headquartered in Switzerland only)  | <input type="checkbox"/> |
| 16. | Childcare expenses (invoices or bills)   | <input type="checkbox"/> |

**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)**

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.

**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. Unsecured interests
  6. Other income (eg: unemployment allowances, rental income, family allowances, annuities, etc.)
  7. Life insurances premiums and/or 3<sup>rd</sup> pillar B certificate
  8. Annual health insurance premiums (LaMal and complementary policies)
  9. Medical expenses not reimbursed by health insurance (invoices, form to complete)
  10. Training, upgrading, retraining or reintegration expenses (for professional purpose only)
  11. Donations (organizations headquartered in Switzerland only)

**INFORMATION & SUPPORTING**

- If you are divorced and remarried, 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.



**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. Unsecured interests  | <input type="checkbox"/> |
| 6. Other income (eg: unemployment allowances, rental income, family allowances, annuities, etc.)          | <input type="checkbox"/> |
| 7. Life insurances premiums and/or 3 <sup>rd</sup> pillar B certificate                                   | <input type="checkbox"/> |
| 8. Annual health insurance premiums (LaMal and complementary policies)                                    | <input type="checkbox"/> |
| 9. Medical expenses not reimbursed by health insurance (invoices, <u>form to complete</u> )               | <input type="checkbox"/> |
| 10. Training, upgrading, retraining or reintegration expenses (for professional purpose only)             | <input type="checkbox"/> |
| 11. Donations (organizations headquartered in Switzerland only)   | <input type="checkbox"/> |
| 12. Childcare expenses (invoices or bills)  | <input type="checkbox"/> |

**INFORMATION & SUPPORTING**

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

**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.

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

**DOCUMENTS**

Please respect this order

- |   |                          |
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| 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. Copy of the notarial deed of your property<br>- Only if purchases or sold during the year or if you are a new client | <input type="checkbox"/> |
| 6. "Taxe d'habitation" (only for second homes and properties rented out for only part of the year)                      | <input type="checkbox"/> |
| 7. "Taxe foncière", front and back, condominium fees, multirisk home insurance  | <input type="checkbox"/> |
| 8. Maintenance costs of the property ( <a href="#">cf. notice N°1/2022</a> )<br>- Maintenance or energy saving invoices | <input type="checkbox"/> |
| 9. Unsecured and/or mortgage interests<br>- Summary or annual certificate. Amortization table not allowed.              | <input type="checkbox"/> |
| 10. Mortgage insurance premiums   | <input type="checkbox"/> |
| 11. Other income (eg: unemployment allowances, rental income, family allowances, annuities, etc.)                       | <input type="checkbox"/> |
| 12. Life insurances premiums and/or 3 <sup>rd</sup> pillar B certificate  | <input type="checkbox"/> |
| 13. Annual health insurance premiums (LaMal and complementary policies)   | <input type="checkbox"/> |
| 14. Medical expenses not reimbursed by health insurance (invoices, <a href="#">form to complete</a> )                   | <input type="checkbox"/> |
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| 16. Donations (organizations headquartered in Switzerland only)   | <input type="checkbox"/> |

**INFORMATION & SUPPORTING**

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

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**MARRIED – REAL ESTATE OWNER– WITH CHILDREN**

**DOCUMENTS**

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