

**Name :** **2019 tax return**

**The following documentation and information is required if you have received other types of income**

1. Alimony or child support income
  - type:
  - amount received:
  - name and address of debtor:
  
2. Did you receive any cash payouts in 2019?
  - from a pension fund: yes  no
  - from a 3<sup>rd</sup> pillar A scheme: yes  no
  - from a private insurance: yes  no
  - indemnities: yes  no
  - following dissolution of a marriage: yes  no
  - an inheritance or a donation: yes  no

Please include the corresponding statements and any tax assessments.

3. Patents, royalty rights, authors' rights, etc \*\*\*
4. Income derived from rental of assets \*\*\*
5. Income derived from any subleases:
6. Other income \*\*\*
7. Residence right (e.g. usufruct), beneficial interest: please explain

**The following documentation and information is required if you have incurred the following types of expenses**

1. AVS and retirement plans:
  - statements of AVS contributions paid by non-salaried individuals
  - statement attesting to the buyback of pension years in a mandatory professional retirement plan in Switzerland or abroad
  - statement attesting to a contribution to a 3<sup>rd</sup> pillar A scheme
  
2. Do you pay pensions or annuities? yes  no 
  - please include statements.
  
3. Alimony or child support payments yes  no 
  - type

\*\*\* Please contact us to discuss your situation

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- name and address of the receiving party:
  - relationship with the receiving party:
  - amount paid during the year:
4. Important medical expenses due to illness or accident \*\*\*
- a. Vaud: medical costs are deductible only to the extent that they represent an important part of the taxpayer's income
  - b. Geneva: medical costs are deductible, even if they only represent a limited part of the taxpayer's income

Please include statements.

You can ask your health and accident insurance company for a yearly statement summarizing premiums paid and invoices not reimbursed to you.

5. Insurance premium (only for Geneva)
- life insurance premium
  - health and accident insurance premium

Please include statements.

6. Important medical expenses due to a handicap, not reimbursed by a health insurance \*\*\*
7. Charities: please include statements made to non-profit organizations.
8. Child care costs for children up to 14 years: please include statements.
9. Rental expenses: please include a copy of the rental contract.
10. Did you make any donations throughout the year?

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**The following documentation and information is required if you have other assets not mentioned beforehand**

1. Life insurance: please indicate the cash surrender value statements of your Swiss and foreign life insurances
2. Cars
  - Do you lease one or more vehicles?                      yes  no
  - If you own cars, please indicate:
    - Date of acquisition (if recent acquisition)
    - Sales price
    - If it is an older car, estimated value as of December 31st, 2019:
3. Any collections, boats or paintings: brief description and value (please include relevant insurance policies)
4. Do you own any animals of significant value (e.g. racing horses)? please include details.
5. Patents, royalty rights, authors' rights \*\*\*
6. Did you inherit? \*\*\*
7. Other elements of assets \*\*\*

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