

Name :

2023 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 2023?
 - from a pension fund: yes no
 - from a 3rd 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 3rd pillar A scheme
2. Do you pay pensions or annuities? yes no
 - please include statements.
3. Alimony or child support payments yes no

*** Please contact us to discuss your situation

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- type
 - 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
- life insurance premium
 - health and accident insurance premium : please provide the certificates for the tax authorities provided by the health insurance.
 - Subsidies received

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, 2023:
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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