

Name :

2023 tax return

The following documentation and information is required if you are retired

1. AVS/AI or foreign social security scheme:

- statements attesting to pensions received from AVS (“assurance – vieillesse et survivants”), AI (“assurance invalidité”), or from foreign social security schemes

2. 2nd pillar:

- Do you receive pensions or other similar remuneration paid by a foreign State (or a political subdivision or a local authority thereof) in respect of services rendered to that State (or subdivision or authority)?
- statements attesting to pensions received from a Swiss 2nd pillar or other mandatory professional retirement plan
- when was the first pension received? (if before January 1, 2002) – if you benefit from more than one pension, please answer this question for each of them

3. 3rd pillar:

- statements attesting to pensions received from a Swiss 3rd pillar scheme (3A and 3B) or from any other voluntary retirement plan (annuities, life insurances, etc)

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