



FIDUCIAIRE MONACHON SARL

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TAX RETURN FOR INDIVIDUALS



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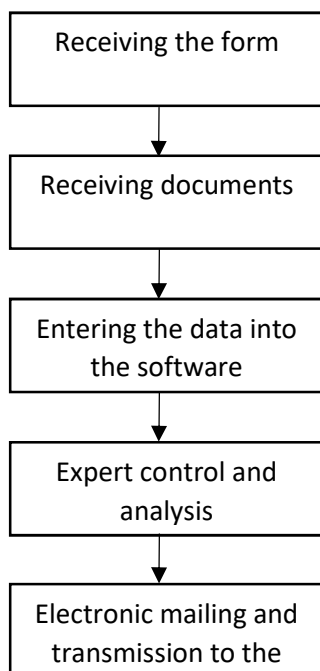
Membre FIDUCIAIRE | SUISSE



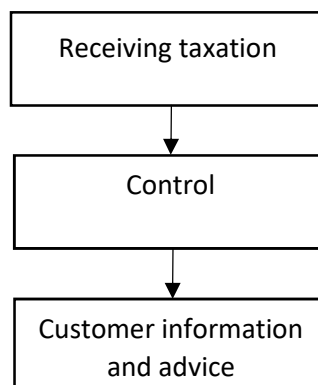
1. Service description

We offer a **comprehensive follow-up** service for your taxes with time management based on your needs and careful review of the file according to the process below:

Phase 1 : Tax return



Phase 2 : Taxation



Our services are billed as a lump sum based on the items to be completed.

If the exchanges of correspondence, maintenance or special calculations for particular situations exceed 30 minutes, they are charged extra. However, this is relatively rare.

For new customers, an additional 30 minutes are available to review the file.

Optimization or projection calculations can be made on demand.



1. Checklist for tax return

First and last name:

Phone:

Email :

Income statements:

- Certificate of Salary/Annuity/Unemployment and Other Daily Allowance
- Balance Sheet/ Losses and Profits (only for the self-employed)
- Details of Support Received
- Certificate of any other income (lotteries, special cases)
- Other relevant indication:

Professional and special deductions:

- Proof of actual professional expenses (above the CHF 2,000 package)-
- Child Care Expenses
- Details of Child Support Paid
- Life Insurance Deductible (3rd Pillar)
- ^{2nd} Pillar Buyback Certificate
- Proof of training, development or retraining costs
- Amount of rent paid without charges
- Tax Certificate of Health Insurance Premiums and Other Unredlected Medical Expenses
- Other relevant indication:

Financial statements:

- Fortune and financial income: certificates of your bank accounts, investments and bonds, securities, loans, bank expense certificates, etc.
- Life Insurance Certificates (buyback values, etc.)
- Debt certificates (credit cards, mortgages, consumer loans, etc.)
- Other relevant indication:

Buildings:

- Rental Income
- Building maintenance costs (bills from state officials, taxes and insurance)
- Other relevant indication:

For new clients, please provide us with a copy of the old tax return and, if possible, the tax decision.

Additional information (to be completed if necessary):

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If you send your documents by email, please send them to us in PDF format

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3. Prices 2021

Below is the tariff base for tax returns.

In order to avoid having to calculate, we can make a quote, for example on the basis of the previous year's statement.

1. <u>Price</u>	<u>CHF of 1 to 3 items</u>	<u>CHF per unit supplement.</u>
Base	30.00--	
Single/separated/divorced	50.00--	
Married people/registered partnership	60.00--	
Children/dependants	10.00	5.00
Wage activities	20.00	20.00
Independent activities on the basis of proofs	30.00	30.00
Annuities/pensions/other income of any kind	10.00	10.00
Securities/ debts	20.00	5.00
Real Estate	30.00	30.00
Unbuilt land	10.00	10.00
Actual building maintenance costs (control or calculation)	15.00	5.00
Life insurance of any type	10.00	10.00
Medical expenses/childcare/donations -	10.00	5.00
Other deductions by list of major deductions	5.00	5.00

*The ability to list yourself to avoid supplements, according to our downloadable forms
Accounting establishment not included*

2. The current mandate includes

- the filing of the tax return
- control of the tax notice
- transmission to the customer, shipping
- 30 minutes of tasks according to figure 3 **
- 1 hour of tasks according to number 3 for all new **customers**

****New as of 2021**

3. Non-mandate tasks include tariffs

- correspondence (email, mail)
- phones
- interviews or travel
- ranking and tidying up
- special calculations
- projections
- recourse
- down payment changes
- hourly rate person in training according to skill level CHF 60.00 to 80.00
- hourly rate trained person CHF 100.00
- specialist hourly rate CHF 140.00

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