



**FIDUCIAIRE MONACHON SARL**

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**TAX RETURN FOR INDIVIDUALS**



We offer you a quality service based on a complete follow-up of your tax file, from the entry of the declaration to the control of the tax decision.

We also manage the deadlines according to your needs and we examine your file conscientiously in order to advise you in the best possible way according to your situation.

We can also do a simple verification of the elements of your tax return and thus be able to advise you in the best way.



**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)
- 2<sup>nd</sup> 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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