

Check-list for the tax declaration

Taxpayers living in Geneva

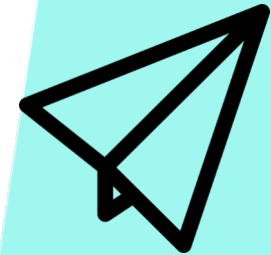


 022 552 00 53

 contact@finwise.ch

Procedure

- 1
- 2
- 3



Compile your files
**according to the order of
the checklist** that fits to
your situation

Scan all you files in
1 single PDF*

Send your merged file to
contact@finwise.ch

*You can use the free app for smartphone **AdobeScan** or an online merger
program as **Smallpdf.com**



smallpdf.com



SINGLE TAX PAYER - NO REAL ESTATE

DOCUMENTS TO GATHER

- 1. Tax declaration and/or registration ID's: **tax payer number** and **declaration code**
- 2. Salary certificate (and *attestation quittance* if taxed at source)
- 3. 3rd pillar A certificate and/or 2nd pillar buyout
- 4. Other professional costs (union dues, specific clothing, etc.)
- 5. Wealth statement at 31 December (Switzerland and abroad)
(Bank accounts, stocks, bonds, dividends, cryptocurrencies, lottery winnings, etc.)
- 6. Unsecured interests (consumer loans, credit cards, loan between third parties, etc.)
- 7. Other revenues (e.g. : family or housing allowances, subsidies, unemployment allowance, pensions, alimony received, etc.)
- 8. Life insurances premiums, 3rd pillar B certificate, foreign life insurances
- 9. Annual health insurance premiums (LaMal and complementary policies)
- 10. Other deductions (alimony paid, life annuities, etc.)
- 11. Medical expenses not reimbursed by health insurance (bills, summary calculation) and eventual impotence (diabetes, celiac, etc.)
- 12. Training, upgrading, retraining or reintegration expenses (for professional purpose and at you expense only)
- 13. Donations and payments to political parties (organizations with headquarters in Switzerland only)
- 14. Childcare costs (invoices or bills) and school certificate if children in age of majority
- 15. Supporting documents if your situation changed during the year (marriage, birth, divorce, death, deed of sale / purchase of real estate)

SINGLE TAX PAYER- REAL ESTATE OWNER

DOCUMENTS TO GATHER

- 1. Tax declaration and/or registration ID's: **tax payer number** and **declaration code**
- 2. Salary certificate (and *attestation quittance* if taxed at source)
- 3. 3rd pillar A certificate and/or 2nd pillar buyout
- 4. Other professional costs (union dues, specific clothing, etc.)
- 5. Wealth statement at 31 December (Switzerland and abroad)
(Bank accounts, stocks, bonds, dividends, cryptocurrencies, lottery winnings, etc.)
- 6. Buying price and locative value of your property
- 7. Maintenance costs of your property (maintenance or energy saving costs, condominium fees, etc.)
- 8. Unsecured and mortgage interests (bank certificate)
- 9. Other revenues (e.g. : family or housing allowances, subsidies, unemployment allowance, pensions, alimony received, etc.)
- 10. Life insurances premiums, 3rd pillar B certificate, foreign life insurances
- 11. Annual health insurance premiums (LaMal and complementary policies)
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- 17. Supporting documents if your situation changed during the year (marriage, birth, divorce, death, deed of sale / purchase of real estate)

MARRIED TAX PAYER - NO REAL ESTATE

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- 3. 3rd pillar A certificate and/or 2nd pillar buyout
- 4. Other professional costs (union dues, specific clothing, etc.)
- 5. Wealth statement at 31 December (Switzerland and abroad)
(Bank accounts, stocks, bonds, dividends, cryptocurrencies, lottery winnings, etc.)
- 6. Unsecured interests (consumer loans, credit cards, loan between third parties, etc.)
- 7. Other revenues (e.g. : family or housing allowances, subsidies, unemployment allowance, pensions, alimony received, etc.)
- 8. Life insurances premiums, 3rd pillar B certificate, foreign life insurances
- 9. Annual health insurance premiums (LaMal and complementary policies)
- 10. Other deductions (alimony paid, life annuities, etc.)
- 11. Medical expenses not reimbursed by health insurance (bills, summary calculation) and eventual impotence (diabetes, celiac, etc.)
- 12. Training, upgrading, retraining or reintegration expenses (for professional purpose and at you expense only)
- 13. Donations and payments to political parties (organizations with headquarters in Switzerland only)
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- 15. Supporting documents if your situation changed during the year (marriage, birth, divorce, death, deed of sale / purchase of real estate)

MARRIED TAX PAYER - REAL ESTATE OWNER

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TAX DECLARATION FEES

TYPE OF TAX DECLARATION

	<u>Fees (VAT incl.)</u>
Tax declaration for single tax payer with no real estate	CHF 99.00
Tax declaration for single tax payer with real estate	CHF 129.00
Tax declaration for married tax payer with no real estate	CHF 149.00
Tax declaration for married tax payer with real estate	CHF 179.00

EVENTUAL FEE INCREASE

Additional real estate	CHF 50.00
Independent activity	CHF 100.00
Securities & real estate: fee increase beyond 10 entries <i>Concerns only the entrance of securities and maintenance or energy saving invoices for your property</i>	CHF 50.00

FAQ

Where can I find the ID's relating to my tax declaration?

These appear on the first page of your tax declaration. They consist of your taxpayer number and a declaration code specific to the year of processing. These are also available on your *e-démarches* account (if you have one).

When should I return my tax return?

The deadline for returning your tax declaration appears on the first page of the tax declaration or in your *e-démarches* account. In principle, this must be returned before March 31.

Can I request a deadline to submit my declaration?

Tax administration allows the initial period to be extended by an additional 3 months for a fee of CHF 20.- and CHF 40.- beyond 3 months. These amounts will be invoiced to you on the final tax statement.

Do I have to attach the supporting documents to my declaration?

Yes. Otherwise, you risk receiving a request for information from tax administration thus delaying the taxation process. You also run the risk of not taking such deductions into account. Some amounts, such as medical costs, simply need to be at disposal of tax administration.

Can I send my declaration if I am missing a document?

Yes. However, this should be mentioned in the comments section. Note that this will likely generate an information request which will delay the tax process as well.

How do I know if my tax invoice is correct?

It may happen that the interpretation of the tax officer differs from yours (or your agent), which can lead to variations in the final tax invoice. It is strongly recommended to check your tax invoice by finwise SA within the legal period of 30 days following the tax decision. We will analyze if this one is correct or if a complaint path is to be considered.

I received an information request .

If this is the case, it is because the tax officer did not have all the information required to tax your declaration. You will need to send the requested documents to finalize the tax process. The tax officer direct phone line is listed in the header of the document for questions relating to it.

I received a reminder for my tax declaration.

If you do not respect the deadline for returning your tax declaration and you have not requested an additional deadline, you will receive an ordinary reminder which will be billed to you CHF 10.- then CHF 20.- in the event of a second reminder.

I got taxed automatically.

If you do not take into account either the ordinary reminder or the registered reminder, you risk an automatic taxation accompanied by additional penalties, as specified in the law. You can however contest it by:

- Writing a complaint letter.
- Enclosing your completed, dated and signed tax declaration.
- Attaching the supporting documents.
- Addressing everything to tax administration.

How do I know if my tax declaration has been received by tax administration?

You can check the date of receipt on your *e-démarches* account.

For all other questions, please contact finwise SA.

Phone : 022 552 00 53

Email : contact@finwise

