

PERSONALIZED EVALUATION FOR QUASI-RESIDENT / TAXATION ORDINAIRE ULTERIEURE (TOU)

Below you will find eight checklists that will help you gather all the necessary documents to evaluate your tax situation. Please note that the result of our analysis will be relative to the documents provided on the day of the evaluation.

For the day of the appointment, please file the documents in the order of appearance of the checklist corresponding to your personal situation.

IMPORTANT !!!

THE ONE AND ONLY CONDITION TO OBTAIN THE STATUS OF QUASI-RESIDENT / TAXATION ORDINAIRE ULTERIEURE (TOU)
IS TO HAVE AT LEAST 90% TAXABLE INCOME IN SWITZERLAND FOR THE FISCAL YEAR

An Excel table is available on the « Etat de Genève » website to help you determine your eligibility :

<http://www.ge.ch/>

SERVICES ET RATES

Personalized evaluation in our offices

1. You make an appointment (maximum 30 min.) by phone or on the link received by email
2. You come with all your documents in the order of the checklist
The hours are from 9am to 12pm and from 13.30pm to 18.00pm
3. We give you our analysis report with the result

Fees to be paid on the day of the appointment

Single

CHF 80.-



+ CHF 20.-
per each property

- CHF 70.- FORFAIT IF YOU ARE NOT ELIGIBLE

Married

CHF 100.-



+ CHF 20.-
per each property

Personalized cyber evaluation (after validation by a tax specialist)

1. You send us your documents in one PDF file in the order of the checklist.
2. Upon receipt of the payment of the fees, we send you by email the result within 5 working days and propose a telephone interview with a tax specialist, if necessary.

Fees to be paid before the communication of the result

Single

CHF 100.-



+ CHF 20.-
per each property

- CHF 70.- FORFAIT IF YOU ARE NOT ELIGIBLE

Married

CHF 120.-



+ CHF 20.-
per each property

N.B. Cash payments receive a discount of CHF 10.- on the total amount

**all our prices are shown exclusive of tax*



Route des Jeunes 49, 1227 Carouge (GE)



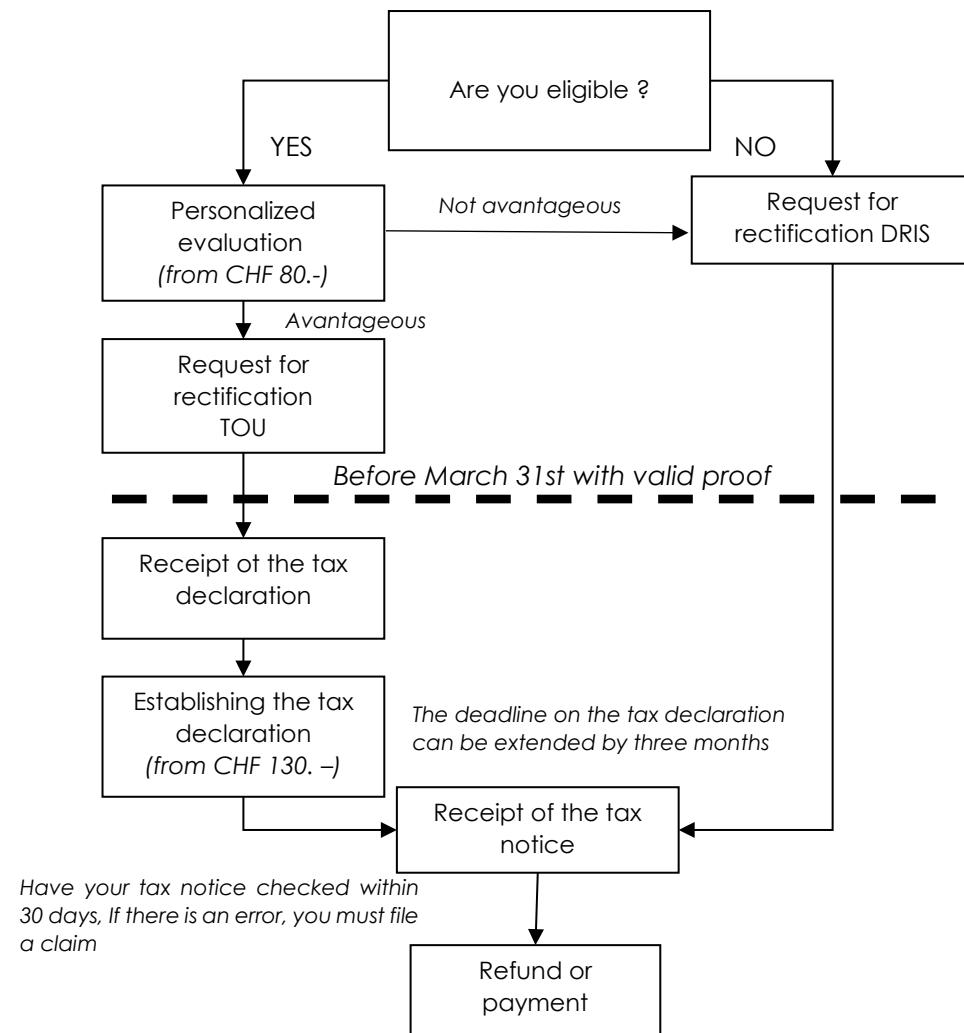
+41 22 508 74 00



info@gva-conseils.ch
www.gva-conseils.ch

REFERENCES CHECK-LIST

1. Single – no real estate – without children
2. Single – no real estate – with children
3. Single – real estate owner – without children
4. Single – real estate owner – with children
5. Married – no real estate – without children
6. Married – no real estate – with children
7. Married – real estate owner – without children
8. Married – real estate owner – with children



DOCUMENTS

Please respect this order

- | | |
|---|--------------------------|
| 1. Tax declaration and/or registration ID's (<i>numéro de contribuable</i> and <i>code declaration</i>) | <input type="checkbox"/> |
| 2. Salary certificate | <input type="checkbox"/> |
| 3. 3 rd pillar A certificate and/or 2 nd pillar buyout | <input type="checkbox"/> |
| 4. Union dues | <input type="checkbox"/> |
| 5. Unsecured interests | <input type="checkbox"/> |
| 6. Other income (eg: unemployment allowances, rental income, family allowances, annuities, etc.) | <input type="checkbox"/> |
| 7. Life insurances premiums and/or 3 rd pillar B certificate | <input type="checkbox"/> |
| 8. Annual health insurance premiums (LaMal and complementary policies) | <input type="checkbox"/> |
| 9. Medical expenses not reimbursed by health insurance (invoices, bills) | <input type="checkbox"/> |
| 10. Training, upgrading, retraining or reintegration expenses (for professional purpose only) | <input type="checkbox"/> |
| 11. Donations (organizations headquartered in Switzerland only) | <input type="checkbox"/> |

INFORMATION & SUPPORTING

- If you are divorced, do you receive or pay any pension?
 - If yes, what amount? (divorce decree)

UNNECESSARY DOCUMENTS (DO NOT SEND US)

Monthly payslips, public transport tickets, toll tickets, year-round bank statement, copy of work permit or passport, parking space invoice, internet printing of your itinerary, pension certificate.

DOCUMENTS

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| 11. Donations (organizations headquartered in Switzerland only) | <input type="checkbox"/> |
| 12. Childcare expenses (invoices or bills) | <input type="checkbox"/> |

INFORMATION & SUPPORTING

- If you are divorced, do you receive or pay any pension?
 - If yes, what amount? (divorce decree)
 - If not, do you have an alternate custody or are you a single parent?
- If you are living with your partner (*concubinage*), is your income higher than that his/hers?
 - If yes, please bring his/hers salary certificate
- Do you have a major child under study during the year?
 - If yes, please bring a study certification

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| 5. Copy of the notarial deed of your property
- Only if purchases or sold during the year or if you are a new client | <input type="checkbox"/> |
| 6. "Taxe d'habitation" mentioning the rental value on the back of the page | <input type="checkbox"/> |
| 7. "Taxe foncière", condominium fees, multirisk home insurance | <input type="checkbox"/> |
| 8. Maintenance costs of the property (cf. notice N°1/2022)
- Maintenance or energy saving invoices | <input type="checkbox"/> |
| 9. Unsecured and/or mortgage interests
- Summary or annual certificate. Amortization table not allowed. | <input type="checkbox"/> |
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INFORMATION & SUPPORTING

- If you are divorced and remarried, do you receive or pay any pension?
 - If yes, what amount? (divorce decree)

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Annex :

	In Euros (€)	In Swiss francs (CHF)
Total bank fees		
Total medical expenses (at your expense only)		
Total property maintenance costs (Renovation and/or energy saving)		
Total childcare costs (do not mention canteen costs)		

Please enter the amounts in their original currency. Your advisor will make the necessary conversions.