RM SOLUTIONS

Your contact: Roberto Moreira dos Santos
Tel. +41 22 796 02 41 · Mobile +41 79 818 23 99
rmoreira@rmsolutions-ge.ch
Avenue Giuseppe-Motta 14bis, 1202 Genève

Documents needed for your 2026 tax return

2026 income and assets · Swiss nationals, C permits, quasi-residents and people taxed at source

Read the full list and send us only the documents that apply to you. The documents in **bold** are the most common. Tick them off as you go so you don't forget anything.

In all cases

- ☐ **Your email address, your phone number and the complete envelope sent by the tax administration, including the reply envelope**
- ☐ Copy of your last tax return and your last tax assessment notice (not needed if we prepared your return last year)
- ☐ “Family situation summary” form (new clients)

Income

- ☐ **Salary certificate(s) from each employer**, and withholding tax statement (attestation-quittance) if you are taxed at source (B or G permit)
- ☐ Pension statements: AVS/AHV, AI/IV, pension fund, foreign pensions
- ☐ Statements of unemployment, sickness or accident benefits
- ☐ Health insurance subsidies and housing allowances received
- ☐ Alimony received
- ☐ Self-employed: annual accounts (balance sheet and income statement)

Assets as at 31 December 2026

- ☐ Interest statements and statements for all your accounts (salary, savings, postal), including abroad
- ☐ **Securities statement from your bank (as at 31.12.2026)**
- ☐ Surrender value of your life insurance policies
- ☐ Vehicles, crypto-assets and other valuables

Debts and deductions

- ☐ Statement of debts and interest paid (certificate from the lender)
- ☐ **Proof of payment of health insurance premiums and other insurance (disability, accident, life)**
- ☐ Pillar 3a contribution certificates and LPP buy-in certificates
- ☐ **Unreimbursed medical and pharmacy costs: ideally your health insurer's annual statement, and your dentist's invoices**
- ☐ Childcare invoices: crèche, day care, childminder, after-school care
- ☐ Supporting documents for dependants
- ☐ Alimony paid
- ☐ Proof of continuing education or professional retraining
- ☐ Receipts for donations to charitable institutions

Property owners

- ☐ Tax value certificate, surface area in m^2 and year of construction
- ☐ Any rental income
- ☐ Maintenance and renovation invoices
- ☐ Purchase or sale deeds signed during the year

Taxed at source (B or G permit): request for ordinary assessment or quasi-resident status

- ☐ The “Formulaire de calcul pour rectification d'impôts à la source” (calculation form), completed
- ☐ The form “Demande de rectification de l'imposition à la source (art. 23 LISP) concernant les revenus de l'année 2026”, pre-filled with the information you know, in black ink. **Deadline: 31 March 2027.**

How to send us your documents
By email to rmoreira@rmsolutions-ge.ch, by post to RM Solutions, Avenue Giuseppe-Motta 14bis, 1202 Genève, or in person during an appointment: **rmsolutions-ge.ch/en/rendez-vous**