



CHF 150.00



Flat rate for initial assessment  
CHF 150.- including 8.1% VAT

# Form for Source-Taxed Individuals - Initial Assessment

Please submit the complete form after payment to [info@mwptreuhand.ch](mailto:info@mwptreuhand.ch)

## Personal Details of Applicant (employed)

Name, First Name	Phone/Mobile
Date of Birth	Street, Number
Religion	ZIP code, City
Marital Status	Country
Passport / Nationality	

## Residence Change Is a residence change planned or has it recently been made?

Date of Residence Change
New Place of Residence
New Country of Residence

## Person 2 (Spouse, Registered Partner)

Name, First Name
Date of Birth
Religion

## Children

Child 1	Child 2
Name, First Name	Name, First Name
Date of Birth	Date of Birth
In First Education Until (age)	In First Education Until (age)
Cost of External Childcare CHF / Year	Cost of External Childcare CHF / Year

Child 3	Child 4
Name, First Name	Name, First Name
Date of Birth	Date of Birth
In First Education Until (age)	In First Education Until (age)
Cost of External Childcare CHF / Year	Cost of External Childcare CHF / Year

## Income / Taxable Assets Please specify the value in CHF.

Person 1	Person 2
Gross Income Monthly Salary CHF	CHF
13th Month Salary <input type="checkbox"/> Yes <input type="checkbox"/> No CHF	<input type="checkbox"/> Yes <input type="checkbox"/> No CHF
Bonus CHF	CHF
Properties in CH CHF	CHF
Movable Assets (estimated) CHF	CHF
Life Insurance <input type="checkbox"/> 3a <input type="checkbox"/> 3b <input type="checkbox"/> Abroad CHF	<input type="checkbox"/> 3a <input type="checkbox"/> 3b <input type="checkbox"/> Abroad CHF