

Request for a renewal of the lump-sum agreement

Request for a new lump-sum agreement. If so, please inform us in case the taxpayers have already been domiciled in Switzerland before this application :

Taxpayer A

Yes No
If yes Ordinary taxation
 Lump-sum taxation

Period of stay from
to

Taxpayer B

Yes No
If yes Ordinary taxation
 Lump-sum taxation

Period of stay from
to

1 Contact details

Taxpayer A

Sir Mrs

Surname
First name
Date of birth
Taxpayer N°
Civil status

Address
Postcode/
City
Occupation
Nationality(ies)

For the new lump-sum agreement request, please indicate your address before arrival

Taxpayer B

Sir Mrs

Surname
First name
Date of birth
Taxpayer N°
Civil status

Address
Postcode/
City
Occupation
Nationality(ies)

For the new lump-sum agreement request, please indicate your address before arrival in Switzerland/Geneva

Family members and other persons financially dependent on taxpayer(s) ¹

Surname	Date of birth	First name	Nationality(ies) ⁽²⁾	Civil status	Occupation ⁽³⁾
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

¹ including children (minor and adult), partner (companion) and family members in Switzerland and abroad

² If the taxpayer has several nationalities, please indicate them

³ without gainful activity, student, schoolchild, etc...

2 Gainful occupation

Do the taxpayers carry out a gainful activity abroad ?

Taxpayer A YES (Employed or Self-employed) NO

Taxpayer B YES (Employed or Self-employed) NO

If yes, please mention the relevant details of the concerned company(ies):

Activity(ies) area

Do the taxpayers carry out a gainful activity in Switzerland ?

Taxpayer A YES (Employed or Self-employed) NO

Taxpayer B YES (Employed or Self-employed) NO

If yes, please mention the relevant details of the concerned company(ies):

Activity(ies) area

Do the taxpayers have a board position in Switzerland ? Yes No

If yes, please mention the relevant details of the concerned company(ies):

Is this position remunerated ? Yes No

Do they hold participation rights of said company(ies) ? Yes No

3 Accommodation in Switzerland

Do taxpayers occupy a property that they own or hold shares in a real estate company ?

If yes, please provide us with the rental value(s)

Geneva	The rest of Switzerland
<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
<div style="border: 1px solid #ccc; height: 15px;"></div>	<div style="border: 1px solid #ccc; height: 15px;"></div>

Is an acquisition planned soon ? If yes, please complete the appropriate [form](#)

<input type="checkbox"/> Yes <input type="checkbox"/> No	
----------------------------------------------------------	--

Do taxpayers occupy a real estate that they rent ?

If yes, please provide us with a copy of the rental agreement(s), or as soon as possible after signing the lease(s).

<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
----------------------------------------------------------	----------------------------------------------------------

Do taxpayers live at the hotel ?

If yes, please provide us with the costs of the monthly pension.

We would appreciate if you would provide us with an invoice from the hotel attesting the costs of pension, i.e. accommodation, food and other expenses.

<input type="checkbox"/> Yes <input type="checkbox"/> No	
<div style="border: 1px solid #ccc; height: 15px;"></div>	<div style="border: 1px solid #ccc; height: 15px;"></div>

4 Lifestyle

Position	Description	Expenditure
Accommodation		
In Switzerland	gross annual rent(s) with charges (including second homes)	
	maintenance costs of owned property(ies) at your disposal	
	mortgage interest	
Abroad	gross annual rent(s) with charges (including second homes)	
	maintenance costs of owned property(ies) at your disposal	
	mortgage interest	
Household staff In Switzerland and abroad	Personal assistant, housemaid, cook, nursemaid, driver, gardener, etc.	
Maintenance		
	Food including restaurant costs	
	Clothes expenses	
	Medical costs, home care, cure, thalassotherapy, aesthetic care, spa, etc.	
	Insurance premiums (health, accident, civil liability, legal, life, etc.)	
	Maintenance contributions and alimony payments	
Leisure and cultural expenses		
	Holidays	
	Sports (annual dues, coach, etc.)	
	Entertainment and hobbies	
Travel		
	Vehicle costs (insurances, maintenance, taxes, leasing, etc.)	
	Other travel expenses	
Miscellaneous costs		
	Rent and/or maintenance of a boat/yacht, private plane, etc.	
	Social contributions	
	School fees	
	Other regular expenses (legal and tax advices, pets and horses, etc.)	
Taxes		
	Total annual expenses	

NB: All charges paid through companies (family office, real estate companies, etc.), on a private basis, must be reported above

5 Estimate of taxpayers resources (Swiss and foreign)

Income estimate	CHF
Composition of income	
Salaries, commissions, fees, etc.	<input type="text"/>
Return on wealth	<input type="text"/>
Other incomes	<input type="text"/>
Total	<input type="text"/>
Net worth estimate	
Composition of net worth	
Real estate assets	<input type="text"/>
Movable assets	<input type="text"/>
Other assets	<input type="text"/>
Total	<input type="text"/>

6 Signature(s)

The undersigned certifies(y) that the above mentioned informations are sincere, complete and in accordance with the truth. He/She/ They undertakes(e) to report without delay to the Tax Administration of the canton of Geneva any significant change in his/her/their situation.

Place and date

Signature - s

By signing :

- you authorize our administration to communicate all useful information concerning your request for a residence permit to the Cantonal Office of Population and Migration
- you certify on your honour that you do not carry out gainful activity in Switzerland and from Switzerland

7 Contact details of the representative

Name

Telephone

Email



If your mandate extends beyond the negotiation of the lump-sum taxation, do not forget to file an [an election of domicile](#), this will facilitate the follow-up the tax file.

This form should be returned to
Administration fiscale cantonale
Direction de la taxation des personnes physiques,
des titres et de l'immobilier
Case postale 3937
1211 GENÈVE 3