

CHECKLIST

OF HELPFUL DOCUMENTS FOR THE SETTLEMENT OF LIFE APART OR FOR A MATRIMONIAL PROCEEDING



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Separation or divorce from your spouse requires thorough preparation, gathering of information, compilation of various documents, and subsequent settlement of various issues.

Regardless of whether you work out a solution yourself or whether you leave it to the judge, you need to know the basics in advance.

1

Details of the persons involved

Create a list with the following information:



To the wife and husband:

Name, maiden name, first name, date of birth, hometown, nationality, AHV number, telephone number

Date and place of marriage (civil marriage)



Details of their representatives

Name, first name, address, phone number



For children: Name, first name, date of birth

2

Personal documents

- Swiss citizens: family identity card (usually not older than three months)
- If both spouses are foreign nationals: certificate or confirmation from the municipality of residence on the place of residence, the date of marriage and joint children (not older than three months).

3

Documents on income:

To calculate **any maintenance claims**, it is important to know and document your income and your family expenses. Living expenses are deducted from the joint income. Ideally, this results in a surplus.

The following documents must always be submitted as enclosures for marriage settlement proceedings. There is a so-called document obligation. Fewer or additional documents are required depending on the income, regulatory requirements and specific circumstances.

- Tax return with auxiliary or supplementary sheets
- Annual salary statement, or current salary statements for the last six months
- For self-employed persons: Balance sheet, income statement for the last two years, complete list of private payments
- Proof of income from sideline activities
- Proof of pension income (AHV, IV, AIV, pension fund pensions, SUVA daily allowances, etc.)
- Tax bills (canton, federal) for the last two years

Documents on expenses or cost of living:

4

Housing costs

- Rental agreement or last rent adjustment (rent, ancillary costs, garage/parking space)
- Heating cost statements
- Receipts for house costs (mortgage interest, maintenance and operating costs, building insurance)

5**Insurances**

- Receipts for health insurance premiums, if applicable, ruling regarding individual premium reduction
- Premiums for household contents and liability insurance
- Premium for legal expenses insurance
- Premium for life insurance
- Possible additional insurances

6**Regularly incurred uninsured health care costs**

- Statement from the health insurance company to be submitted to the tax authorities at the end of the year
- Medical expenses (franchise, deductible)
- Dental costs
- Opticians

7**More**

- Telephone bills
- Radio and TV fees (Billag or Serafe invoices)
- Professional expenses (travel costs to work, leasing rates for a car with a competence character, catering costs, necessary contributions to professional associations)
- Receipts for interest payments on debts
- Supporting documents for tax invoices
- Account statements (incl. 3rd pillar)
- In the case of self-employment: payment into the 3rd pillar
- Receipts for childcare costs (crèche, after-school care, family day care, school lunch, etc.)
- School fees
- Receipts for maintenance obligations

TAMARA FREHNER

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- Thank you for your interest in working with me. I look forward to actively shaping your future together with you.
- As an independent attorney-at-law since 2007 and as a SBA / SCCM mediator, I help private individuals and entrepreneurs to find pragmatic, creative solutions to legal challenges.
- Furthermore, I prefer business contexts, which is why I worked as a lecturer teaching business law at the HWZ University of Applied Sciences for Business Administration Zurich and as the chairwoman of the board of directors of an SME. During my international postgraduate studies (LL.M.) in Boston, I focused on "international business practice". I am also admitted to the New York State Bar (Esq.).
- I look forward to hearing from you to discuss how I may support you.

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