



Your documents for financial planning

PENSION PROVISION (1ST, 2ND AND 3RD PILLAR)

- ☐ **Individual AHV account statement (IA statement)**
Not ordered yet? No problem – we'll show you how to do it online in 5 minutes.
- ☐ **Pension fund certificates and regulations**
- ☐ **Vested benefits accounts or policies**
- ☐ **Pillar 3a accounts and policies (incl. surrender values)**
- ☐ **Pillar 3b life insurance policies (incl. surrender values)**

INSURANCE & PROTECTION

- ☐ **Health insurance policies**
Basic and supplementary insurance.
- ☐ **Details on continued salary payment in case of illness & accident**
E.g. staff regulations or the employer's daily sickness benefits policy.

TAXES & ASSETS

- ☐ **Detailed tax return**
Including statements of securities, real estate and debts.
- ☐ **Account and custody statements from third-party banks**

PERSONAL & LEGAL

- ☐ **Marriage and inheritance contract, divorce agreement**
If available.
- ☐ **Financial statements of the last 3 years**
For company shareholdings or self-employment.

IF ALREADY AVAILABLE – HELPFUL, BUT NOT REQUIRED

- ☐ **Personal annual budget before and after retirement**
- ☐ **AHV pension pre-calculation**

YOU WILL RECEIVE FROM US FOR SIGNATURE

- ☐ **Power of attorney and mandate**
Bring both signed, or return them to us in advance.

Don't have everything at hand? Come anyway.

Bring what you have – we'll organise the rest together during the meeting.

Submit your documents securely via the client portal or to: info@baeriswylberatungen.ch