Trachsel Bortolani Partner

rechtsanwälte & mediatoren



In order to calculate maintenance and/or child support and your entitlement with regard to matrimonial property, your legal representative needs the documents listed below. If these records are already in your possession, please bring them along to your first meeting.

Re	ecords of your family income and expenditure:
	Current monthly and annual wage statements (Lohnausweis, Salärbelege)
	The last 3 tax declarations, including all supplementary documents (withholding tax application etc.)
	If you are self-employed: the last 3 financial statements (balance sheets and profit and loss accounts)
	Records of your housing expenses (tenancy agreement, mortgage agreements, utility bills and any other
	extra charges) and other living expenses, such as telephone, radio, TV, health insurance and insurance
	policies, school fees, childcare, medical bills (ordinary flat rate (Franchise), fixed excess (Selbstbehalt))
	dental bills, optician, transport and taxes
Re	ecords of your retirement provisions:
	Current pension fund policies (BVG, 2nd Pillar) and information on leaving benefits accrued to date
	Information about vested benefits accumulated before the marriage; pension fund regulations.
Re	ecords on your matrimonial property situation and each party's assets:
	Marriage contracts (prenuptial or postnuptial agreements etc.)
	Any existing estate division agreement or inheritance agreement
	Complete statements of bank accounts and safekeeping accounts
	Life insurance policies (if possible already indicating the current redemption value, including dividend)
	Eurotax residual value assessments of your vehicles
	Confirmation regarding the value of any individual retirement savings (3rd Pillar A or "tied" pension provi-
	sion) from your bank/insurance agency
	Tax declaration of the year in which you were married
	your matrimonial property includes real estate:
	Purchase contract
	Current detailed land register extract / abstract of title
	Records of the balance of mortgage currently outstanding as well as current mortgage rates
	List of any other upkeep and maintenance charges
	Records of the source of the financial means used to purchase, amortise the mortgage, renovate or refur-
	bish the property
	ecords and receipts of financial transactions between the spouses:
	Compensation records of wife working in her husband's business.
	Lists of joint or individual debts outstanding vis-à-vis banks (small personal loans!) or third parties as wel
	as any outstanding tax payments.
	scellaneous:
	Any existing separation decisions or agreements, medical certificates, reports by child or adult protection
	authorities, school or youth psychologists concerning the children, et al.