

Home ownership consultation

Checklist of documents to be submitted

Personal Documents	To be obtained from
<input type="checkbox"/> Current salary statement (incl. bonus statement for the last 3 years)	Employer
<input type="checkbox"/> Copy of the last definitive tax return	Self-declaration/Tax office
<input type="checkbox"/> Bank statements	Bank
<input type="checkbox"/> Pension fund statement with vested benefit assets	Pension Fund
<input type="checkbox"/> Pension fund regulations	Pension Fund
<input type="checkbox"/> In case of early withdrawal: Simul. of pension fund benefits	Pension Fund
<input type="checkbox"/> V Insurance policies: life insurance, risk insurance. (submit original in case of pledging), disability pension	Insurance/Bank
<input type="checkbox"/> Pension assets 3rd pillar	Insurance/Bank
<input type="checkbox"/> Current debt collection information	Debt Collection Office
<input type="checkbox"/> Authorization for bank to obtain information	Bank
<input type="checkbox"/> Leasing and small loan agreements	Credit institution
Property documents	To be obtained from
<input type="checkbox"/> Current extract from the land register	Land registry/seller
<input type="checkbox"/> Current official estimate	public community/seller
<input type="checkbox"/> External real estate appraisal	Seller/broker/valuator
<input type="checkbox"/> Notarized purchase agreement / draft purchase agreement	Land registry/seller/broker
<input type="checkbox"/> Cadastral plan or site plan / zoning plan	Seller/broker
<input type="checkbox"/> Building insurance certificate	Building insurance/seller
<input type="checkbox"/> Construction plans / cubic calculation / construction description	Seller/architect
<input type="checkbox"/> Building lease contract + current building lease rate	Land registry/notary's office/seller
<input type="checkbox"/> Sales documentation	Seller/broker
<input type="checkbox"/> Documents for energy rating (energy certificate, GEAK, Minergie, etc.)	Seller/broker
<input type="checkbox"/> Additional building information (heating type, consumption, living area, year of construction ([in case of condominium ownership: living area of the entire property])).	Seller/broker
<input type="checkbox"/> Photos of the object: <input type="checkbox"/> Aussenaufnahmen <input type="checkbox"/> Innenaufnahmen	Seller/broker
<input type="checkbox"/> Rent index or copies of rental agreements of rented properties	Seller/property management
<input type="checkbox"/> Cost summary of major renovations (billing, receipts)	Seller/property management

Additional documentation for new construction and remodeling projects	To be obtained from
<input type="checkbox"/> Additional documentation for new construction and remodeling projects	Local building authority/builder
<input type="checkbox"/> Building permit / certificate of legal force	Seller/broker/architect/builder
<input type="checkbox"/> Construction description / cubic calculation / list of craftsmen	Seller/architect/builder
<input type="checkbox"/> Cost estimate with construction cost plan no.	Seller/architect/builder
<input type="checkbox"/> Craftsmen directory	Building insurance/builder
<input type="checkbox"/> Construction insurance / Construction period insurance	Pension Fund
<input type="checkbox"/> General contractor agreement / total contractor agreement	General - /Total Contractor
<input type="checkbox"/> Service contract	Seller/architect
<input type="checkbox"/> Construction/remodeling plans	Seller/architect
<input type="checkbox"/> Sales price list for SFH / CA	Seller

Additional documents for condominium ownership	To be obtained from
<input type="checkbox"/> Purchase price list + documentation	Seller/broker/builder
<input type="checkbox"/> Net living space calculation	Seller/broker/builder
<input type="checkbox"/> Use and Management Regulations of the Condominium Owners' Association	Seller/land registry
<input type="checkbox"/> Condominium property foundation contract (with value quota distribution)	Seller/land registry
<input type="checkbox"/> In the case of condominium ownership under building law: Service charge statements incl. stated building law rent	Seller/broker

Additional documents for self-employed persons / legal entities	To be obtained from
<input type="checkbox"/> Balance sheet / income statement for the last 3 years	Trustee
<input type="checkbox"/> Auditor's report (if subject to audit)	Auditors
<input type="checkbox"/> Budget	Trustee
<input type="checkbox"/> Commercial register excerpt	Commercial Register Office
<input type="checkbox"/> Liquidity planning / financial planning	Trustee
<input type="checkbox"/> Budgeted balance sheet and budgeted income statement	Trustee

Additional documents for building land	To be obtained from
<input type="checkbox"/> Building regulations / zoning plan	Seller
<input type="checkbox"/> Superstructure / projects (if available)	Seller
<input type="checkbox"/> Excerpt from the register of suspected contaminated sites	Register of contaminated sites / seller

Additional documents: Information for investment objects (e.g. commercial / multi-family house)	To be obtained from
<input type="checkbox"/> Tenants' list / Lease agreements	Seller / Real estate management
<input type="checkbox"/> Leasing documentation / preliminary contracts	Seller / Real estate management

Other