

CHECKLIST BEQUEATHING OR GIVING AWAY FROM REAL ESTATE

It is advisable to think about estate planning early on, especially as significant tax advantages can play a role when it comes to passing on your assets or real estate.

[Here to - BJ Inheritance Law - for more info](#)

NR.	DESCRIPTION	CHECK
1	Swiss inheritance law is regulated in Part Three of the Civil Code, from Article 457 onwards. Here to Inheritance Law Article 457	<input type="checkbox"/>
2	Find out about the various options for distributing your estate: <ul style="list-style-type: none"><input type="checkbox"/> Official succession<input type="checkbox"/> Mandatory share regulation<input type="checkbox"/> Regulation through a will<input type="checkbox"/> Regulation by an inheritance contract (in contrast to a will, cannot be changed unilaterally (Articles 512 ff. ZGB)<input type="checkbox"/> Donation<input type="checkbox"/> Advance withdrawal More info!<input type="checkbox"/> Right of residence or usufruct in the case of a gift or advance withdrawal of inheritance Here are the basics of Swiss inheritance law	<input type="checkbox"/>
3	Find out about inheritance tax and possible tax-free amounts for gifts in your canton. Bear in mind that both the domicile of the deceased and that of the heir play a role. Here to tax rates by canton	<input type="checkbox"/>
4	In many cases, it is advisable to have open communication with the family members concerned about the distribution of the inheritance. This helps to avoid potential conflicts within the family, develop supportive plans for the future and make tax-optimized decisions.	<input type="checkbox"/>

DISCLAIMER

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5 Talk to a lawyer and/or tax advisor to consider all legal and tax factors and avoid mistakes.

6 It is advisable to review your documents regularly and make any necessary adjustments or changes to ensure that they always correspond to current planning requirements or decisions.

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