**Your! Tax Information Form**

**‘’If you have not RECEIVED/MISSED Covid-19 Economic Stimulus Payment, we will help you receive it with your 2020 Tax Refunds’’.**

Thanks a lot for giving us an opportunity to show you our High Tax knowledge through the tax returns 2020, and our service level agreement is just 5hours, it means you will get the entire tax return as tax estimate **in just** **5 hours.**

After you receive the initial tax return, our tax experts who are Chartered Accountants and CPA’s will call you back and explain you the entire tax returns, based on your additional information you will receive final tax returns as tax estimates in just 3 hours and thereafter you can call us numerous times and there is no consultation fee at all.

**Remember!** As you are going to get tax estimates through us, you will be covered with our below tax services worth **$2,000 without any cost all**.

**100% Data security**

**100% Audit support on your already filed tax returns**

**Unlimited tax consultations with our Chartered Accountants and CPA’s**

**Satisfactory customer service throughout the year (365 days).**

**100% Satisfaction guarantee**

**11 Quality value added tax services**

**10 Additional benefits**

**11 QUALITY VALUE ADDED TAX SERVICES**

* Tax Experts Unlimited Consultations
* Accurate Tax Estimates
* Form 1040 FREE E-Filing Income $28000
* Tax Planning for TY 2020 & 2021
* Filed Tax Returns Assessment & Examination
* ITIN Guidance and Support
* FBAR & FATCA Guidance & E-Filing
* Seeking Extension for Tax Filing
* Tax Expert Support for Notices & Audits etc.
* FICA Taxes Withdrawals Guidance
* W4 Guidance & Assistance

**ADDITIONAL BENEFITS:**

* 365 days Customer Support
* Quick Refunds in short time
* Maximum Refunds by Our High Tax Knowledge
* 100% Data Security
* Preserve your tax returns up to 9 tax years with highest data security
* Covered by data protection laws
* 100% Satisfaction Guarantee
* Accuracy Guarantee
* Audit & Assurance
* Confidentiality

**Please fill the details below to get accurate tax estimates with unlimited tax consultations with our Tax**

**Experts & Professionals in just 5 hours:**

**YOUR DETAILS:**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Particulars** | **Primary Taxpayer** | **Spouse**  | **Child 1** | **Child 2** | **Other Dependent** |
| First Name **(as per SSN)** | Anamika |  |  |  |  |
| Middle Name **(as per SSN)** | Chandrashekhar |  |  |  |  |
| Last Name **(as per SSN)** | Burile |  |  |  |  |
| Date of Birth *(mm/dd/yy)* | 05/19/1993 |  |  |  |  |
| SSN/ITIN | 387377380 |  |  |  |  |
| **Occupation** | Associate Business Analyst |  |  |  |  |
| Cell Number | 7374029661 |  |  |  |  |
| Work Number *(With Extension)* | 5135813709 |  |  |  |  |
| Email Id | anamika.burile@gmail.com |  |  |  |  |
| Relationship with Primary Taxpayer?***(Son/Daughter/Parents****)* | self |  |  |  |  |
| Visa Type as on Dec 31, 2020 | F1 |  |  |  |  |
| Was there any change in the Visa Status during 2020? Mention dates | No |  |  |  |  |
| Marital Status as on Dec 31, 2020 | un-married |  |  |  |  |
| Date of Marriage*(mm/dd/yy)* |  |  |  |  |  |
| ***(\*Mandatory Current*** Address and ***Zip code)*** | 12501 Tech Ridge Blvd, Apt 632, Austin, TX - 78753 |  |  |  |  |
| First Port of Entry Date into US ***(mm/dd/yy)*** | 03/14/2018 |  |  |  |  |
| Will you stay in US for more than 6 months in 2021? (**Yes** *or* **No**) | yes |  |  |  |  |
| No. of months stayed in US during 2020 | 12 |  |  |  |  |

**STATE RESIDENCY DETAILS:**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Tax Year** | **State** | **Taxpayer** | **State** | **Spouse** |
| **From****(mm/dd/yy)** |  **To****(mm/dd/yy)** | **From (mm/dd/yy)** | **To (mm/dd/yy)** |
| **2020** | North Carolina | 03/01/2020 | 05/31/2020 |  |  |  |
| **2020** | Texas | 06/01/2020 | 12/31/2020 |  |  |  |
| **2019** | California | 01/01/2019 | 09/30/2019 |  |  |  |
| **2019** | North Carolina | 10/01/2019 | 12/31/2019 |  |  |  |

**BANK ACCOUNT DETAILS FOR DIRECT DEPOSIT OF REFUND / DIRECT DEBIT OF TAX DUE AMOUNT:**

|  |
| --- |
| **(For Deposit of Refund / Auto Withdrawal of Owe Amount)** |
| Bank Name |  |
| Account Number |  |
| Routing Number (**Electronic Only**) |  |
| Account Type (Savings/Checking) |  |
| Account Owner Name |  |

**EMPLOYMENT DETAILS:**

|  |  |  |
| --- | --- | --- |
|  | **Taxpayer** | **Spouse** |
| Name of the Employer | HCL America Solutions, Inc |  |
| Employer Location (City, State) | Austin, Texas |  |
| Designation | Associate Business Analyst |  |
| **Occupation** |  |  |
| Employment Start Date  | 06/22/2019 |  |
| Employment End Date  | - |  |
| Visa Status  | F1 |  |

**ECONOMIC IMPACT PAYMENT:**

|  |  |  |
| --- | --- | --- |
| **PAYMENT TYPE** | **YES/NO** | **RECEIVED AMOUNT** |
| Did you Receive Your Economic Impact Payment |  No |   |
| Did you Receive Economic Impact Payment **Notice: 1444** |  No |   |

**OTHER EXPENSES:**

|  |  |  |
| --- | --- | --- |
| **Expense Type** | **Taxpayer $ Amount** | **Spouse** **$ Amount** |
| * Last Year Tax Preparation Fees
 |  |  |
| * Home Mortgage Interest & Points (For property in US) - Provide Form 1098 - Enter only the Interest Amount not your EMI
 |  |  |
| * Property Taxes (For property in US)
 |  |  |
| * Property Taxes (For property in India)
 |  |  |
| * Student Loan Interest Paid in US - Provide Form 1098-E
 |  |  |
| * Tuition Fees Paid in US - Provide Form 1098-T (Resident Aliens and Citizens)
 |  |  |
| * Contributions to Traditional IRA (Individual Retirement Account) - This is not 401K provided by your Employer. If Roth IRA, please mention Roth IRA
 |  |  |
| * Contributions to HSA (Health Savings Account) - Provide Supporting Doc
 |  |  |
| * Educator Expenses (if you/your spouse is a Teacher/Faculty)
 |  |  |
| * Medical Expenses
 |  |  |
| * **Any state refunds for TY2019?**
 |  |  |
| * Cost of Energy Saving Equipment (E.g. Solar Water Heater, Boiler, Skylights, Electric Heat Pump, Natural Gas Propane, Metal Roofing, Wooden Furnace, etc.) - Mention Equipment Purchased & Cost
 |  |  |
| * Any other expenses not listed above
 |  |  |
| * **Capital gain or (loss)**
 |  |  |

|  |  |
| --- | --- |
| **Did You or your Spouse have any of the below Forms** |  **Yes/No** |
| **1098 (Mortgage Interest Statement)** |  |
| **1098 – T (Tuition fee statement)** |  |
| **1098 – E (Student Loan Interest Statement)** |  |
| **1099 – B (Proceeds from Broker and Barter Exchange Transactions)****\*Mandatory Consolidated Form/supplemental information/Employer stock forms (ESPP/RSU/3921 & 3922 forms)** |  |
| **1099 -C (Cancellation of Debt)** |  |
| **1099 – DIV (Dividends and Distributions)** |  |
| **1099 – G (Certain Government Payments)** |  |
| **1099 – HC (State Form MA 1099-HC Individual Mandate Massachusetts Health Care Coverage)** |  |
| **1099 – INT (Interest Income Statement)** |  |
| **1099 – K (Payment Card and Third-Party Network Transactions)** |  |
| **1099 – MISC (Miscellaneous Income Statement)** |  |
| **1099 – OID (Original Issue Discount)** |  |
| **1099 – Q (Payments from Qualified Education Programs (Under Sections 529 and 530)** |  |
| **1099 – R (Distributions from Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.)** |  |
| **1099-SA (Distributions From an HSA, Archer MSA, or Medicare Advantage MSA)** |  |
| **W2 - G (Certain Gambling Winnings** |  |
| **1095 – A (Health Insurance from Market Place)** |  |
| **1099 – NEC (Nonemployee Compensation)** |  |

**CHILD AND DEPENDENT CARE EXPENSES:**

|  |
| --- |
| **(Day Care Expenses are applicable if your Spouse is WORKING or FULL TIME STUDENT)** |
| a. Name of the Dependent for whom these expenses were incurred |  |
| b. Name of the Institution/Person to whom the amount was paid |  |
| c. Federal ID/SSN of the Institution/Person to whom the amount was paid |  |
| d. Address of the Institution (Street Address, City, State, Zip code) |  |
| e. Amount of Expenditure Incurred |  |
| f. Amount reimbursed by the Employer, if any |  |

**CHARITABLE CONTRIBUTIONS: None**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **S.no** | **Name of the Charitable Institution** | **Amount Donated** | **Property Donated & it's Fair Market Value (FMV) on the date of contribution** | **No. of Trips in the year one-way distance Home and the Charitable Institution** |
| **1** |  |  |  |  |
| **2** |  |  |  |  |
| **3** |  |  |  |  |

**RENTAL INCOME:**

|  |  |
| --- | --- |
| **Particulars** | **Details** |
| * Property Type? (Residential/Commercial)
 | No |
| * Location/Address
 |  |
| * Specify the following:
* No. of months rented in year 2020
* No. of months **you** used for personal purpose
 |  |
| * Property is owned by (Taxpayer/Spouse/Joint)
 |  |
| * Date this property was purchased **(mm/dd/yy)**
 |  |
| * Cost of the property
 |  |
| * Rental Income received
 |  |
| * Rental Expenses incurred to earn Rent, if any
 |  |

**OTHER INCOME:**

|  |  |  |
| --- | --- | --- |
| **Income Type** | **Taxpayer $ Amount** | **Spouse** **$ Amount** |
| 1) Self-employment-**1099MISC** | No |  |
| 2) Gambling | No |  |

**FBAR / FATCA:**

|  |  |  |
| --- | --- | --- |
|  | **Taxpayer (Yes/No)** | **Spouse (Yes/No)** |
| Did you have more than $10,000 in your Foreign Accounts at any time during the Tax Year 2020?  | No |  |
| Did you have more than $50,000 in your Foreign Accounts at any time during the Tax Year 2020? | No |  |

**FOREIGN INCOME:**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Particulars** | **Salary Income (INR)** | **Dividend Income(INR)** | **Interest Income(INR)** | **Rental Income(INR)** |
| * **Foreign Income from which source (Including Interest from Foreign Banks)**
 | No |  |  |  |
| * Amount of Foreign Income
 |  |  |  |  |
| * **Foreign Taxes other than US Taxes (if any) withheld**
 | No |  |  |  |

**VEHICLE DETAILS:**

|  |  |
| --- | --- |
| a) Have you owned any Vehicle during the Tax Year 2020? | No |
| b) Is this a Hybrid or Alternative Motor Vehicle or Electric Vehicle? | No |
| c) Was the Vehicle used for travel to **Client Locations?** | No |
|  If used at Client Locations - Please provide the following information: |  |
| 1) Make & Model of the Vehicle |  |
| 2) Purchase Date |  |
| 3) Cost Price |  |
| 4) Total Mileage during Tax Year 2020(See Car Odometer) |  |
| 5) One-way commuting distance between Home & Client Location |  |
| 6) Sales & Excise Tax paid on the vehicle bought in Tax Year 2020 |  |

 **“Need help in below tax filing for your Businesses, we can be an absolute choice.”**

* **Sole Proprietorship**
* **Partnership**
* **Limited Liability Company**
* **Business Corporation**

**Other Tax Services for Businesses:**

* **Book Keeping**
* **Payroll Management**
* **Accounting**
* **Business Incorporation**

**NOTES TO TAX PREPARER:**

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As you are aware about our **$2000 worth** **11 Tax Services with 10 Additional benefits, 100% data security, 100% Audit support**. We would like to extend our Free of cost Tax Services and Additional benefits to your Friends and Colleagues as well, so that they can appreciate you a lot.

**Please mention your Friends and Colleagues contact details below, so that we can honour you with $10 for Each Paid Referral.**

|  |  |  |
| --- | --- | --- |
| **Name of your Friend/Colleague** | **Email Id** | **Contact Number** |
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Crescent Tax Filing is adhered to strictly follow the Data Protection Laws of US and India, which is an obligation to use your details only for your tax preparation rather than any other purposes. Once again thanks a lot for your time spent on providing your details, we ensure that you get your tax estimates in just 5 hours and have a satisfactory customer service.

For any inquiries please email us through taxsupport@crescenttaxfiling.com and you can call us on **916-241-4499**.