



# GLOBAL TAX

## CLIENT TAX NOTES – TY2019

### PERSONAL INFORMATION

Particulars	Primary Taxpayer	Spouse	Dependent 1 (Child1)	Dependent 2 (Child -2)	Dependent 3 (Other dependent person)
FIRST NAME (PER SSN/ITIN)	Monisha	Nandakumar			
MIDDLE NAME (PER SSN/ITIN)	N/A	N/A			
LAST NAME (PER SSN/ITIN)	Mohan	Vijayakumar			
SSN/ITIN NUMBER	719-22-6654	828-29-1586			
DATE OF BIRTH (MM/DD/YY)	04/21/1991	12/15/1990			
RELATIONSHIP WITH PRIMARY TAXPAYER	N/A	Husband			
OCCUPATION	Quality Engineer	Teaching Assistant			
CURRENT ADDRESS	4311 Kuder Lane, Warsaw, IN-46582	4311 Kuder Lane, Warsaw, IN-46582			
CELL NUMBER	682-219-7094	817-271-5566			
ALTERNATIVE NUMBER (HOME)	N/A	N/A			
WORK NUMBER (WITH EXTENSION)	N/A	N/A			
EMAIL ADDRESS	monishamohan8709@gmail.com	nandsome@gmail.com			
FIRST PORT OF ENTRY DATE (MM/DD/YY)					
VISA STATUS ON 31 <sup>ST</sup> DEC 2019	H1B	F1			
ANY CHANGE IN VISA STATUS DURING THE YEAR 2019 (IF YES PLS. SPECIFY)	N/A	N/A			
MARITAL STATUS AS ON DEC 31,2019	Married	Married			
DATE OF MARRIAGE (IF APPLICABLE)	28 October 2018	28 October 2018			
FILING STATUS (SINGLE/MARRIED/HEAD OF HOUSEHOLD)	Married, filing separately	Married, filing separately			
NO. OF MONTHS STAYED IN US DURING 2019	12	12			
WILL YOU STAY IN US FOR MORE THAN 183 DAYS IN	Yes	Yes			



# GLOBAL TAX

YEAR 2020 – (YES OR NO)					
IF ANY OTHER INFORMATION					

### BANK ACCOUNT DETAILS

BANK DETAILS FOR DIRECT DEPOSIT OF REFUND AMOUNT/AUTO WITHDRAWAL OF OWE AMOUNT(OPTIONAL)	
BANK NAME	
BANK ROUTING NUMBER (PAPER OR ELECTRONIC)	
BANK ACCOUNT NUMBER	
CHECKING / SAVING ACCOUNT	
ACCOUNT HOLDER NAME	

### RESIDENCY DETAILS:

STATES RESIDENCY DETAILS				STATES RESIDENCY DETAILS			
TAXPAYER				SPOUSE			
YEAR	STATE(S)	FROM (MM/DD/YY)	TO (MM/DD/YY)	YEAR	STATE(S)	FROM (MM/DD/YY)	TO (MM/DD/YY)
2019	Indiana	01/01/19	12/31/19	2019	Texas	01/01/19	12/31/19
2018	Indiana	01/01/18	12/31/18	2018	Texas	01/01/18	12/31/18
2017	Indiana	01/01/17	12/31/17	2017	Texas	01/01/17	12/31/17