



## CLIENT TAX NOTES – TY2020

Dear Tax Payer,  
Greetings!

Please fill the below Tax Organizer form and upload it in your secured login or even you can E-mail it to us at [tripura@gtaxfile.com](mailto:tripura@gtaxfile.com) along with your Form W2 & any other income statement and any other relevant documents to prepare and analyze your taxes and share you a Free Tax return Draft Copy for TY2020.

**IF YOU RECEIVED STIMULUS CHECK, PLEASE MENTION THE AMOUNT YOU RECEIVED, IF NOT PLEASE MENTION AS "NO"**

2020	Amount :
2021	Amount :

### PERSONAL INFORMATION

Particulars	Primary Taxpayer	Spouse	Dependent 1 (Child1)	Dependent 2 (Child -2)	Dependent 3 (Other dependent person)
FIRST NAME (PER SSN/ITIN)	Sai Priyatam				
MIDDLE NAME (PER SSN/ITIN)					
LAST NAME (PER SSN/ITIN)	Batchu				
SSN/ITIN NUMBER	279-17-3967				
DATE OF BIRTH (MM/DD/YY)	07/18/94				
RELATIONSHIP WITH PRIMARY TAXPAYER	Self				
OCCUPATION	Software Engineer				
CURRENT ADDRESS	14117 N Rockwell Ave, Apt 11208, Oklahoma City, Oklahoma ZIP – 73142				
CELL NUMBER	9402200416				
ALTERNATIVE NUMBER (HOME)	-				
WORK NUMBER (WITH EXTENSION)	-				
EMAIL ADDRESS	<a href="mailto:Priyatam.hf88@gmail.com">Priyatam.hf88@gmail.com</a>				
FIRST PORT OF ENTRY DATE (MM/DD/YY)	08/13/16				
VISA STATUS ON 31 <sup>ST</sup> DEC 2020	H1B				



# GLOBAL TAX

ANY CHANGE IN VISA STATUS DURING THE YEAR 2020 (IF YES PLS. SPECIFY)	Yes, 01/01/20 – 09/30/20 – F1 10/01/20 – 12/31/20 – H1B				
MARITAL STATUS AS ON DEC 31,2020	Single				
DATE OF MARRIAGE (IF APPLICABLE)	NA				
FILING STATUS (SINGLE/MARRIED/HEAD OF HOUSEHOLD)	Single				
NO. OF MONTHS STAYED IN US DURING 2020	12				
WILL YOU STAY IN US FOR MORE THAN 183 DAYS IN YEAR 2021 – (YES OR NO)	Yes				
IF ANY OTHER INFORMATION					

**NOTE: IF YOU DO NOT HAVE AN SSN FOR YOUR SPOUSE/DEPENDENTS WE CAN APPLY FOR ITIN. FOR ITIN APPLICATION PROCESSING PLEASE REACH US ON (551)-271-1611 OR WRITE TO [shravani@gtaxfile.com](mailto:shravani@gtaxfile.com)**

### CHILD AND DEPENDENT CARE EXPENSES PROVIDER DETAILS -

DEPENDENT NAME	NAME OF THE ORGANIZATION	ADDRESS WITH PHONE NUMBER	FEDERAL ID NUMBER (EIN / SSN) OF THE ORGANIZATION / PERSON WHO PROVIDED THE CARE.	AMOUNT PAID

**1. DEPENDENTS UNDER AGE 24 WITH UNEARNED INCOME (E.G. INTEREST OR DIVIDENDS EARNED, STOCK SALE PROCEEDS) GREATER THAN \$950 MAY NEED TO FILE A RETURN.**

**NOTE: DEPENDENTS WITH UNEARNED INCOME GREATER THAN \$1,900 ARE SUBJECT TO THEIR PARENT'S TAX RATE. COORDINATION OF RETURNS BETWEEN PARENT AND CHILD IS VERY IMPORTANT.**

**2. PLEASE COMPLETE CHILDCARE EXPENSES SECTION ONLY IF BOTH TAXPAYER & SPOUSE ARE WORKING.**

### BANK ACCOUNT DETAILS

<b>BANK DETAILS FOR DIRECT DEPOSIT OF REFUND AMOUNT/AUTO WITHDRAWAL OF OWE AMOUNT(OPTIONAL)</b>	
BANK NAME	
BANK ROUTING NUMBER (PAPER OR ELECTRONIC)	
BANK ACCOUNT NUMBER	



# GLOBAL TAX

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)
2020				2020			
2019				2019			
2018				2018			

### Home Mortgage Interest

Home mortgage interest paid in US - *FORM 1098Mandatory	Points, if any	Home mortgage interest paid in INDIA - *Below details required	Mortgage insurance premiums paid, if any	Investment interest. Attach Form 4952
		Bank Name (Foreign)	Bank Address (Foreign)	

**Note:** Are you planning to purchase any House Property in Tax Year 2021 In United States Of America

Please Mention Yes Or No

Yes

No

**CHARITY CONTRIBUTIONS**

S.no	Charitable Institution Name	Donated Amount	Property Donated	FMV of Property Donated	No. of trips driven and one way distance
1					
2					
3					

**Note: 1) Cash Contribution more than \$ 250 receipts are Mandatory  
2) Non - Cash Contribution more than \$ 500 receipts are Mandatory**

**HEALTH INSURANCE:**

Are you and your dependents covered under Health Coverage as per Federal laws??? Mandatory	
If not so, please specify who are not covered and for how many months	
IF you/your spouse resident of MA state, Covered by Massachusetts Health Insurance. Please provide F0rm 1099-HC.	

**INVESTMENTS – SALE &PURCHASE OF STOCKS**

For stocks you will receive 1099-B form from vendors like Robinhood, Etrade etc., If the stocks were given by your employer you will receive a supplemental document and you need to submit it also.

Purchase Date	Description of Stock	Qty	Rate per Unit	Total =Qty*Rate	Sale Date	Description of the Stock	Qty	Rate per Unit	Total= Qty*Rate

Note: If you have more than 10 transactions, Please send us the sale and purchase details in an Excel sheet with the columns listed above.

**Other Deductions – Adjustments to Income**

Particulars	Taxpayer	Spouse
Educator expenses – only for Teaching profession (\$ 250)		
Health savings account Contribution		
Penalty on early withdrawal of saving		
Contribution towards Traditional IRA for 2020		
Student loan interest deduction – Provide Form 1098 E		
Tuition & Fees Provide Form 1098-T		



# GLOBAL TAX

Gambling Losses

## FOR FBAR/FATCA

	Tax Payer(No)	Spouse (No)
Did you have more than \$10,000 in your Foreign Accounts at any time during the Tax Year 2020		
Did you have more than \$50,000 in your Foreign Accounts at any time during the Tax Year 2020		

Note: You may have to report FBAR (Foreign Bank Account Report) before April 15, 2021 if the aggregate of your Bank Accounts/Securities Accounts/Other Financial Accounts exceeded \$10,000 at any time during the tax year 2020. You may have to file FATCA (Foreign Account tax Compliance Act) before April 15, 2021 with your tax return if the aggregate of your Bank Accounts/Securities/Other financial Accounts exceeded \$50,000 at any time during the tax year 2020.

### UPLOAD /EMAIL THE FOLLOWING DOCUMENTS ALONG WITH THE THIS TAX ORGANISER

Duly Filled TY-2020 Tax Organizer	
<b>W-2's:</b> Wages/salaries from All employers – Upload Documents	
<b>1099-INT &amp;1099-DIV:</b> Interest & Dividends for All Accounts	
<b>1099-B:</b> Sales of Securities, Mutual Funds, etc.	
<b>Year-End:</b> Investment statements, Mutual Fund supplemental information	
<b>1099-R:</b> Income from Pension, IRAs and Annuities	
<b>1099-G:</b> Unemployment Compensation/state income tax refund	
<b>K-1:</b> Partnerships,Trusts,Estates and S-Corporations	
<b>Last Paystubs</b> of the year from ALL Employers	
<b>1099-SSA/ 1099-RRB:</b> Social Security and Railroad Retirement benefits	
<b>Scholarships, Fellowships and Grants Form 1042 S</b>	
<b>Foreign Tax certificate ( if you made any income from foreign country during 2020)</b>	
<b>Disability and Sick Pay</b>	
<b>Gambling Winnings</b>	
<b>Form W-2G – Income from Gambling</b>	
<b>Prizes and Awards</b>	
<b>Rental Income (if any) INDIA or USA</b>	
<b>Alimony Received (if any)</b>	
<b>Home Mortgage Statement (India) (From 01<sup>st</sup> Jan To 31<sup>st</sup> Dec)</b>	
<b>Education Loan Interest Certificate (India) (From 01<sup>st</sup> Jan To 31<sup>st</sup> Dec)</b>	
<b>Form-1099HC-(Details Required From Tax Payer who is residing in MA)</b>	



# GLOBAL TAX

For New ITIN Or Renewal ITIN (Passport and VISA First and Last page is required)

Refer a friend(s) to get Referral Bonus@ \$ 10 for Each paid client to us.\*\*

S. No	Friend(s) Name	Friends E-mail ID	Contact Number
1			
2			
3			
4			
5			
6			

Feel Free to reach us at (212)-920-4151, (305)-359-3078  
(Monday to Saturday 9:00 AM to 8:00 PM EST)

### Tax Preparation Fee for TY2020

<u>Filing Status:</u> Single   MFJ   MFS   HOH   QWDC	
Particulars	Fee(\$)
Federal – Standard Return (Form 1040)	\$ 19.99
Each State Tax Return	\$ 34.99
Federal – Non Resident Tax Return (Form 1040NR)	\$ 59.99
Federal – ITIN Case (Paper filing)- Form 1040	\$ 89.99
Federal – Non Resident Spouse Election (Paper Filing) (6013G & H)	\$ 119.99
Federal – Schedule C, E & 1099 Misc	\$ 119.99
FBAR Processing	\$29.99
For State Rental Credit Planning/OSTC Credit Planning	\$19.99
City Return (KY, MI, NY, OH, PA) / County Return	\$ 19.99 each city
Stock Transaction	\$ 10 Per Page
FATCA Processing - Form 1040	\$29.99
Tax Representation (Unlimited (Up to 8 Succeeding Years)	*Free*
Planning charges (with planning)	10% on planning benefit

- In case of any audit taxpayer need to furnish the documents as per IRS guidelines to substantiate the claim made on the tax return.
- Claim only those expenses that you have incurred while working at client location and which is necessary expenditure to work at client locations, not lavish by nature but should be supported by proper documentary evidence.

Thank you for completing this form and Please upload or email your w2 and other income related statements to prepare your taxes accurately.

Looking for your Business & Support!

Warm Regards,  
Global Taxes LLC. (Global Taxes team)



# GLOBAL TAX

Phone : (212)-920-4151,(305)-359-3078, 214-271-0082,678-720-1887(whatsapp )

Email : [tripura@gtaxfile.com](mailto:tripura@gtaxfile.com)

GLOBAL TAXES LLC