**Personal Details:**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Particulars | Primary Taxpayer  (as per SSN) | Spouse | Child 1 | Child 2 | Any other dependent |
| First Name | Amit | Nidhi | Shivika |  |  |
| Middle Name | Kumar | Rani | Singh |  |  |
| Last Name | Singh |  |  |  |  |
| Date of Birth *(mm/dd/yy)* | 07/01/1981 | 12/26/1984 | 11/26/2012 |  |  |
| SSN/ITIN | 655398111 | 948942039 | 948942078 |  |  |
| Relation with  Primary Taxpayer? | Primary | Spouse | Daughter |  |  |
| Visa Type as on Jan 01, 2020 | H1B | H4 | H4 |  |  |
| Visa Type as on Dec 31, 2020 | H1B | H4 | H4 |  |  |
| Marital Status as on Dec 31, 2020 | Married | Married | Single |  |  |
| Date of Marriage | 11/06/2011 | 11/06/2011 |  |  |  |
| Current Address | 8008 Lake union hill way  Alpheratta GA 30004 | 8008 Lake union hill way  Alpheratta GA 30004 | 8008 Lake union hill way  Alpheratta GA 30004 |  |  |
| First date of Entry into US *(mm/dd/yy)* | 02/07/2015 | 02/07/2015 | 02/07/2015 |  |  |
| Home Number |  |  |  |  |  |
| Cell Number | 678 477 3535 | 678 477 3535 | 678 477 3535 |  |  |
| Email Id | Amit0591@gmail.com | Amit0591@gmail.com | Amit0591@gmail.com |  |  |
| Did You Get Stimulation Check in 2020  Yes Or No  Note: Its not a Taxable income.  If you haven’t recived any check you can claim in 2020 returns along with your Refund |  |  |  |  |  |

**Residency Details:**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Tax year | States Resided (Taxpayer) | Period of Stay  (From Date & To Date/Till Date) | | States Resided (Spouse) | Period of Stay  (From Date & To Date/Till Date) | |
| 2021 | **Atlanta** | **12/2020** | **Till date** | **Atlanta** |  |  |
| 2020 | **California** | **06/2019** | **12/2020** | **California** | **06/2019** | **12/2020** |
|  |  |  |  |  |  |  |
| 2019 | **California** | **01/2019** | **12/2020** |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
| 2018 | **Atlanta** | **02/2015** | **12/2018** | **Atlanta** | **02/2015** | **12/2018** |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |

**Other Expenses:**

|  |  |  |
| --- | --- | --- |
| Last Year Tax Preparation Fees | 150150 | 1555fd |
| Job Search Expenses |  |  |
| 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) |  |  |
| Home Mortgage Interest (For property in India/Foreign Country) - Please mention Bank Name, Bank Address & Interest Amount in USD - Provide only Interest Amount not your EMI |  |  |
| Student Loan Interest Paid in US - Provide Form 1098-E |  |  |
| Tuition Fees Paid in US - Provide Form 1098-T |  |  |
| Contributions to Traditional IRA (Individual Retirement Account) |  |  |
| Contributions to HSA (Health Savings Account) - Provide Supporting Doc |  |  |
| Margin Interest on Stocks |  |  |
| Educator Expenses (if you/your spouse is a Teacher/Faculty) |  |  |
| Medical Expenses | 1000 |  |
| Any state refunds for TY-2019?(If Itemized) |  |  |
| 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) |  |  |

**Child & Dependent Care Expenses:**

|  |  |
| --- | --- |
| (Example: Day Care Expenses, Preschool/Nursery Expenses, etc. if Spouse WORKING or FULL TIME STUDENT) | |
| Name of the Dependent for whom these expenses were incurred |  |
| Name of the Institution/Person to whom the amount was paid |  |
| Federal ID/SSN of the Institution |  |
| Address of the Institution (Street Address, City, State, Zip code) |  |
| Amount of Expenditure Incurred |  |
| Amount reimbursed by the Employer, if any |  |

**Charitable Contributions**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| S.No | Name of the Charitable Institution | Amount Donated | Property Donated & its Fair Market Value (FMV) on the date of contribution | No. of Trips in the year X One-way distance Home and the Charitable Institution |
| 1 | Auction Foundation |  | 1500 |  |
| 2 |  |  |  |  |

**Note:** Please maintain Receipts to support your claims.

**Investments – Sale & Purchase of Stocks (ISOs, ESPPs, & Securities)**

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Purchase Details | | | | | Sale Details | | | | |
| Date Purchased | Stock Description | Quantity | Rate per Unit | Total = Qty \* Rate | Date Sold | Stock Description | Quantity | Rate per Unit | Total = Qty \* Rate |
|  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |

**Rental Income (If Any):**

**Note:** Please fill in these details if you had any Rental Income from your Residential/Commercial Property.

|  |  |
| --- | --- |
| Particulars | Details |
| Property Type? (Residential/Commercial) |  |
| Location/Address |  |
| Specify the following:   1. No. of months rented in year 2020 2. 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 |  |
| Property Taxes |  |

If you/your spouse have below documents, please upload or email along with tax organizer

|  |
| --- |
| * Duly Filled in Tax Organizer of 2020 (mandatory) |
| * Wage Income – Form W2/Corrected W2 (mandatory) |
| * Last Year Federal & State Tax Return |
| * Interest Income – Form 1099-INT |
| * Dividend Income – Form 1099-DIV |
| * State Tax Refund/Unemployment Compensation – Form 1099-G |
| * Self-Employment Income/Business Income – Form 1099-MISC |
| * Sale of Shares/Securities – Form 1099-B |
| * Retirement Distributions – Form 1099-R |
| * Rental Income from US Property |
| * Foreign Tax Certificate (if you made any income from foreign country during 2020) |
| * Student Loan Interest – Form 1098-E |
| * Home Mortgage Interest – Form 1098 |
| * Tuition Statement - Form 1098-T |

**Notes to Tax Preparer:**

|  |
| --- |
| If you wish to give any additional information to Tax Preparer, you can please type below: |
| *--Monthly rent In CA $2022 include water and electricity.* |
|  |
|  |
|  |
|  |
|  |
|  |
|  |

**Note:** Please elaborate on any of your tax data, or include facts and circumstances we should be aware of in order to properly prepare your tax return. Also include any questions you may have.