**3rd Stimulus:**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| ACTC | July | Aug | Sep | Oct | Nov | Dec |
|  | 1400 |  | 1400 |  |  |  |

**PERSONAL INFORMATION**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Particulars** | **Primary taxpayer** | **Spouse** | **Dependent 1**  **(child 1)** | **Dependent 2**  **(child 2)** | **Dependent 3**  **(other person)** |
| First Name \* | AJAYA BABU | UMA SUNDARI | **SUJANA** | **GREESHMA** | **KUSHAL SAIVENKAT** |
| Middle Name\* |  |  |  |  |  |
| Last Name\* | PRUDHIVI | PRUDHIVI | **PRUDHIVI** | **PRUDHIVI** | **PRUDHIVI** |
| SSN/ITIN Number | **147-23-7119** | 924986116 | 924986121  810-69-4713 (SSN) | 924-986132 | 924-98-6142 |
| Date of birth(M/D/Y) | 07/30/1968 | 04/27/1971 | **12/24/1998** | **06/22/2000** | **05/29/2006** |
| Relationship with primary taxpayer |  | **WIFE** | **Kid** | **Kid** | **Kid** |
| Occupation | **Service** | **House wife** | **Study** | **Study** | **Study** |
| Current address | **1703 HALTON DR GROVETOWN ,GA-30813** | **1703 HALTON DR GROVETOWN ,GA-30813** | **625 West Madison St, Apt 1311 , Chicago,IL 60661** | 2A,205,SMR VINAY CITY,NR.MIYAPUR X RD,HYD-50. | **1703 HALTON DR GROVETOWN ,GA-30813** |
| Cell number | 480-208-8296 | **NA** | **+480 452 6628** | **NA** | **+602 807 0228** |
| Alternate number | **NA** | **NA** | **NA** | **NA** | **NA** |
| Email address | **AJAYA.PRUD@GMAIL.COM** | **UMAPRUD@GMAIL.COM** | **NA** | **NA** | **NA** |
| First port of entry  (M/D/Y) | 08/01/2010 | 08/24/2012 | 08/24/2012 | 08/24/2012 | 08/24/2012 |
| Visa status as on12/31/2020 | **H1b** | **H4** | **F1** | **No Visa** | **H4** |
| Marital status as on 12/31/2020 | **Married** | **Married** | **NA** | **NA** | **NA** |
| Date of marriage | 03/07/1996 | **NA** | **NA** | **NA** | **NA** |
| Filing status | Yes |  |  |  |  |
| No of months stayed is us in 202 | 12 | 4 | 12 | NOT STAYED | 4 |

\* Please fill the above details as per your SSN/ITIN

Child and Dependent Care Expenses Provider Details

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Dependent name** | **Name of Organization** | **Address with phone number** | **Federal id number** | **Amount paid** |
| UMA SUNDAR | HOUSE WIFE- H4 Dependant | 1703 HALTON DR, GROVETOWN,GA-30813. | 924986116 |  |
| SUJANA | Student -F1 | **625 West Madison St, Apt 1311 , Chicago,IL 60661** | 924986121  810-69-4713 (SSN) |  |
| GREESHMA | Student - india | 2A,205,SMR VINAY CITY,NR.MIYAPUR X RD,HYD-50. | 924-986132 |  |
| KUSHAL SAI VENKAT | Student-H4 Dependant | 1703 HALTON DR, GROVETOWN,GA-30813. | 924-98-6142 |  |

Please complete childcare expenses section only if both taxpayer and spouse are working.

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| State Residency Details | | | | State 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)** |
| **2021** | **CO** | **01/01/21** | **10/15/21** | **2021** | **GA** | **10/20/21** | **Till date** |
| **2020** | **NJ** | **01/01/20** | **03/15/20** | **2020** | **CO** | **03/15/20** | **12/31/2020** |
| **2019** |  |  |  | **2019** |  |  |  |
| **2018** |  |  |  | **2018** |  |  |  |

HOME MORTGAGE INTEREST (HMI)

|  |  |  |  |
| --- | --- | --- | --- |
| **Home mortgage interest paid in US- \*FORM 1098 mandatory** | **Indian HMI paid**  **(bank name & address required)** | **Mortgage insurance premiums paid, if any** | **Investment interest.**  **Attach Form 4952** |
|  |  |  |  |
|  |  |  |  |

BANK ACCOUNT DETAILS

|  |  |
| --- | --- |
| **Bank details for direct deposit of refund amount/auto withdrawal of owe amount (optional)** | |
| **Bank name** | **Bank of America** |
| **Routing number** | **021200339** |
| **Account number** | **381026567958** |
| **Checking/saving account** | Checking |
| **Account holder name** | **Ajaya Babu Prudhivi** |

OTHER DEDUCTIONS – ADJUSTMENTS TO INCOME

|  |  |  |
| --- | --- | --- |
| **PARTICULARS** | **TAXPAYER** | **SPOUSE** |
| **Educator expenses – only for teaching profession ($250)** |  |  |
| **Health savings account contribution** | 6990 |  |
| **Penalty on early withdrawal of saving** |  |  |
| **Contribution towards traditional IRA for 2020** |  |  |
| **Student loan interest deduction – provide FORM 1098E** |  |  |
| **Tuition & Fees FORM 1098-T** |  |  |

|  |  |  |
| --- | --- | --- |
| FBAR / FATCA | **Taxpayer**  **(Yes/No)** | **Spouse**  **(Yes/No)** |
| **Did you transferred more than $10,000 to your foreign accounts at any time during the TY2021** | Yes | NA |
| **Did you have assets valuing more than $50,000 in foreign on your name during the TY2021** | NA | NA |

UPLOAD/EMAIL THE FOLLOWING DOCUMENTS ALONG WITH TAX NOTES

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| W-2 | 1099INT ,1099DIV | 1099-B,1099R | 1042 S | 1099-G | 1099SSA,RRB |
| Disability and sick pay | Winnings from gambling | Prizes and awards | Rental income | Alimony received | HMI(INDIA) |

* If you received any of the following documents please mail us along with tax notes.

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 and support.

**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 TY2021** | |
| **Filing Status: Single |MFJ |MFS |HOH | QWDC** | |
| **Particulars** | **Fee($)** |
| **Federal - Standard Return (Form 1040)** | **$ 19.99** |
| **Each State Tax Return** | **$ 39.99** |
| **Federal - Non Resident Tax Return (Form 1040NR)** | **$ 59.99** |
| **ITIN Case (Paper filing)-Certification** | **$ 119.99** |
| **ITIN case - Non Resident Spouse Election (Paper Filing) (6013G & H)** | **$ 99.99** |
| **ITIN (With assistance) – W7, Guidance** | **$49.99** |
| **Federal – Schedule A** | **$99.99** |
| **Federal – Schedule C, E,1099 Misc & 1099 NEC** | **$ 119.99** |
| **FBAR Processing** | **$29.99** |
| **For State Rental Credit Planning/OSTC Credit Planning** | **$19.99** |
| **City Return (KY, MI, NY, OH, PA) / County Return** | **$ 29.99 each city** |
| **Stock Transaction** | **$ 9.99 Per Page** |
| **FATCA Processing - Form 1040** | **$29.99** |
| **Tax Representation (Unlimited Up to 8 Succeeding Years)** | **\*Free\*** |

* **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)**

**Phone : (470)-480-1881**

**Email : info@gtaxfile.com**

24-Dec-98