

## CLIENT TAX NOTES – TY2021

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 [info@gtaxfile.com](mailto:info@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 TY2021.

### 3rd Stimulus:

ACTC	July	Aug	Sep	Oct	Nov	Dec

### PERSONAL INFORMATION

Particulars	Primary Taxpayer	Spouse	Dependent 1 (Child-1)	Dependent 2 (Child-2)	Dependent 3 (Other dependent person)
FIRST NAME (PER SSN/ITIN)	Durga	Vijaya	Ram	Krishna	Shiva
MIDDLE NAME (PER SSN/ITIN)	Srinivas	Durga	YashChanakya	SaiMourya	TejAdithya
LAST NAME (PER SSN/ITIN)	Basavaraju	Basavaraju	Basavaraju	Basavaraju	Basavaraju
SSN/ITIN NUMBER	577317894	667300726			
DATE OF BIRTH (MM/DD/YY)	10/04/1968	01/16/1973	03/21/2006	05/02/2007	07/26/2009
RELATIONSHIP WITH PRIMARY TAXPAYER	Self	self	son	son	son
OCCUPATION	Software	Teacher	student	student	student
CURRENT ADDRESS	21 CHURCHILL DOWNS, LAKE OSWEGO 97035	21 CHURCHILL DOWNS, LAKE OSWEGO 97035	21 CHURCHILL DOWNS, LAKE OSWEGO 97035	21 CHURCHILL DOWNS, LAKE OSWEGO 97035	21 CHURCHILL DOWNS, LAKE OSWEGO 97035
CELL NUMBER	214-500-5223				
ALTERNATIVE NUMBER (HOME)					
WORK NUMBER (WITH EXTENSION)					
EMAIL ADDRESS	Durga.basavaraju@gmail.com				



# GLOBAL TAX

FIRST PORT OF ENTRY DATE (MM/DD/YY)					
VISA STATUS ON 31 <sup>ST</sup> DEC 2021	US CITIZEN	GREEN CARD	USC	USC	USC
ANY CHANGE IN VISA STATUS DURING THE YEAR 2021 (IF YES PLS. SPECIFY)	NA	NA	NA	NA	NA
MARITAL STATUS AS ON DEC 31,2021	MARRIED	MARRIED	NA	NA	NA
DATE OF MARRIAGE (IF APPLICABLE)	NA	NA	NA	NA	NA
FILING STATUS (SINGLE/MARRIED/HEAD OF HOUSEHOLD)	MARRIED, FILING JOINTLY	MARRIED, FILING JOINTLY			
NO. OF MONTHS STAYED IN US DURING 2021	12	12	12	12	12
WILL YOU STAY IN US FOR MORE THAN 183 DAYS IN YEAR 2022 – (YES OR NO)	YES	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 (470)-480-1881 OR WRITE TO [info@gtaxfile.com](mailto:info@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**



# GLOBAL TAX

BANK DETAILS FOR DIRECT DEPOSIT OF REFUND AMOUNT/AUTO WITHDRAWAL OF OWE AMOUNT(OPTIONAL)	
BANK NAME	BANK OF AMERICA
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)
2021	OR	010121	123121	2021	OR	010121	123121
2020	OR	010120	123120	2020	OR	010120	123120
2019	OR	010119	123119	2019	OR	010119	123119

### 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
		<b>Bank Name (Foreign)</b>	<b>Bank Address (Foreign)</b>	

**Note:** Are you planning to purchase any House Property in Tax Year 2022 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	<b>YES</b>
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 Form 1099-HC.	

**INVESTMENTS – SALE & PURCHASE OF STOCKS**

For stocks you will receive 1099-B form from vendors like Robinhood, Etrade, Apex Clearing 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 2021		
Student loan interest deduction – Provide Form 1098 E		



# GLOBAL TAX

Tuition & Fees <b>Provide Form 1098-T</b>		
Gambling Losses		
Alimony paid		

## 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 2021	<b>NO</b>	<b>NO</b>
Did you have more than \$50,000 in your Foreign Accounts at any time during the Tax Year 2021	<b>NO</b>	<b>NO</b>

Note: You may have to report FBAR (Foreign Bank Account Report) before April 15, 2022 if the aggregate of your Bank Accounts/Securities Accounts/Other Financial Accounts exceeded \$10,000 at any time during the tax year 2021. You may have to file FATCA (Foreign Account tax Compliance Act) before April 15, 2022 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 2021.

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

Duly Filled TY-2021 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-MISC :</b> Miscellaneous Document	
<b>Year-End:</b> Investment statements, Mutual Fund supplemental information	
<b>1099-NEC :</b> Non-Employment Document	
<b>1099-B :</b> Sales of Securities, Mutual Funds, etc.	
<b>1099-C:</b> Cancellation of Debt. Document	
<b>1099-OID :</b> Original Issue Discount	
<b>1099-PATR :</b> Taxable Distributions Received From Cooperatives	
<b>1099-R:</b> Income from Pension, IRAs and Annuities	
<b>1099-G:</b> Unemployment Compensation/State & Local income tax refund	
<b>1099-K :</b> Merchant Card and Third Party Network Payments	
<b>1099-Q :</b> Payments from qualified education programs	
<b>1099-SA :</b> Distributions from a HSA	
<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>	



# GLOBAL TAX

Foreign Tax certificate ( if you made any income from foreign country during 2021)	
Disability and Sick Pay	
Gambling Winnings Form W-2G – Income from Gambling	
Prizes and Awards	
Rental Income (if any) INDIA or USA	
Alimony Received (if any)	
Home Mortgage Statement (India) (From 01 <sup>st</sup> Jan To 31 <sup>st</sup> Dec)	
Education Loan Interest Certificate (India) (From 01 <sup>st</sup> Jan To 31 <sup>st</sup> Dec)	
Form-1099HC-(Details Required From Tax Payer who is residing in MA)	
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 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



# GLOBAL TAX

Tax Representation (Unlimited Up to 8 Succeeding Years)	*Free*
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- 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](mailto:info@gtaxfile.com)

GLOBAL TAXES LLC