EAZYREFUND

**CLIENT TAX NOTES – TY 2022**

## PERSONAL INFORMATION

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **PARTICULARS** | **PRIMARY TAXPAYER** | **SPOUSE\*\*** | **DEPENDENT 1****(CHILD 1)** | **DEPENDENT 2****(CHILD 2)** | **DEPENDENT 3****(OTHER PERSON)** |
| LAST NAME \* | **SIRIMALLA** | **GANGULA** |  |  |  |
| FIRST NAME \* | **ARUN KUMAR** | **SAIKRUPA** |  |  |  |
| MIDDLE NAME\* |  |  |  |  |  |
| SSN/ITIN NUMBER | **022-99-5084** | **984-98-9560** |  |  |  |
| OCCUPATION | **SOFTWARE ENGINEER** | **HOUSE WIFE** |  |  |  |
| DATE OF BIRTH(MM/DD/YY) | **11/07/1991** | **05/29/1996** |  |  |  |
| RELATIONSHIP WITH PRIMARY TAXPAYER |  |  |  |  |  |
| CURRENT ADDRESS | **3002 PATTY LN,****#5, MIDDLETON, WI.53562** | **3002 PATTY LN,****#5, MIDDLETON, WI.53562** |  |  |  |
| CELL NUMBER | **(786)786-7979** | **(818)699-9888** |  |  |  |
| ALTERNATE NUMBER |  |  |  |  |  |
| EMAIL ADDRESS | **ARUN.SIRIMALLA7@GMAIL.COM** | **SAIKRUPA.SIRIMALLA@GMAIL.COM** |  |  |  |
| FIRST PORT OF ENTRY(MM/DD/YY) |  |  |  |  |  |
| VISA STATUS AS ON12/31/2022 | **H1B** | **H4** |  |  |  |
| ANY CHANGE IN VISA STATUS DURING THE YEAR 2022 | **F1 - H1B** |  |  |  |  |
| MARITAL STATUS AS ON 12/31/2022 | **MARRIED** | **MARRIED** |  |  |  |
| DATE OF MARRIAGE | 02/10/2021 | 02/10/2021 |  |  |  |
| FILING STATUS | PLANNING | PLANNING |  |  |  |
| NO OF MONTHS STAYED IS US IN 2022 | 333 DAYS (10 MONTHS 27 DAYS) | 305 DAYS (9 MONTHS 30 DAYS) |  |  |  |
| 3 RD STIMULUS AMOUNT RECEIVED  | $539.84 |  |  |  |  |
|  ADVANCE CHILD TAX CREDIT RECEIVED IN EVERY MONTH  |  |  |  |  |  |

\* PLEASE FILL THE ABOVE DETAILS AS PER YOUR SSN/ITIN

\*\* FILL SPOUSE DETAILS ONLY IF SHE/HE HAS SSN/ITIN

**CHILD AND DEPENDENT CARE EXPENSES PROVIDER DETAILS**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **DEPENDENT NAME** | **NAME OF ORGANIZATION** | **ADDRESS WITH PHONE NUMBER** | **FEDERAL ID NUMBER** | **AMOUNT PAID** |
|  |  |  |  |  |
|  |  |  |  |  |

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)** |
| **2022** | **WI** | **01/01/2022** | **12/31/2022** | **2022** | **WI** | **03/02/22** | **12/31/2022** |
| **2021** | **WI** | **01/01/2021** | **12/31/2021** | **2021** |  |  |  |
| **2020** | **WI** | **01/01/2020** | **12/31/2020** | **2020** |  |  |  |
| **2019** | **WI** | **01/01/2019** | **12/31/2019** | **2019** |  |  |  |

**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**  |
| **BANK NAME** | BANK OF AMERICA |
| **CHECKING/SAVING ACCOUNT** | CHECKING |
| **ROUTING NUMBER** | **051000017** |
| **ACCOUNT NUMBER** | **435035170444** |
| **ACCOUNT HOLDER NAME** | ARUN KUMAR, SIRIMALLA |

**IDENTITY PROOF**

|  |  |  |
| --- | --- | --- |
|  | **TAXPAYER** | **SPOUSE** |
| **TYPE OF ID (DRIVING LICENSE(OR) STATE ISSUED ID)** | S6540009140703 | G5247809668913 |
| **NUMBER**  | (786)786-7979 | (818)699-9888 |
| **ISSUED STATE** | WISCONSIN | WISCONSIN |
| **ISSUED DATE** | 06/06/2022 | 09/12/2022 |
| **EXPIRATION DATE** | 09/30/2023 | 09/30/2023 |
| **LAST YEAR (TY2022) ADJUSTED GROSS INCOME** |  |  |

**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 2022** |  |  |
| **STUDENT LOAN INTEREST DEDUCTION – PROVIDE FORM 1098E** |  |  |
| **TUITION & FEES FORM 1098-T** |  |  |

|  |  |  |
| --- | --- | --- |
| **FBAR / FATCA** | **TAXPAYER****(YES/NO)** | **SPOUSE****(YES/NO)** |
| **IF YOU ARE HAVING MORE THAN $10,000 IN ALL OF YOUR FOREIGN ACCOUNTS AT ANY TIME DURING THE TY2022** |  |  |
| **DID YOU HAVE ASSETS VALUING MORE THAN $50,000 IN FOREIGN ON YOUR NAME DURING THE TY2022** |  |  |

**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.

**REFERRAL SCHEME (REFER AND EARN)**

|  |
| --- |
| **REFER YOUR FRIENDS OR COLLEAGUES TO GET REFERRAL BONUS @ $10 FOR EACH SUCCESSFUL REFERRAL PAYMENT**  |
| FRIEND/COLLEAGUE NAME | E-MAIL ID | CONTACT NUMBER |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

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.

WARM REGARDS,

**EAZY REFUND**

VINOD@EAZYREFUND.COM