

CLIENT TAX NOTES – TY2022

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 bhagya@gtaxfile.com along with your Form W2 & any other income and expense statement and any other relevant documents to prepare and analyze your taxes and share you a Free Tax return Draft Copy for TY2022.

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

PERSONAL INFORMATION

Particulars	Primary Taxpayer	Spouse	Dependent 1 (Child-1)	Dependent 2 (Child-2)	Dependent 3 (Other dependent person)
FIRST NAME (PER SSN/ITIN)	Sridhar reddy	Vikitha reddy	Saavyas reddy		
MIDDLE NAME (PER SSN/ITIN)					
LAST NAME (PER SSN/ITIN)	manik	Chitikela	Manik		
SSN/ITIN NUMBER	658938388	391534862			
DATE OF BIRTH (MM/DD/YY)	10/24/1990	11/18/1993	01/10/2019		
RELATIONSHIP WITH PRIMARY TAXPAYER		Wife	Father		
OCCUPATION	IT	IT			
CURRENT ADDRESS	5775 PARKWOOD BLVD ,APT1210, FRISCO-75034				
CELL NUMBER	4692139696	4694654080			
ALTERNATIVE NUMBER (HOME)					

WORK NUMBER (WITH EXTENSION)					
EMAIL ADDRESS	SRIDHARMSREDDY@GMAIL.COM	VIKITAREDDY@GMAIL.COM			
FIRST PORT OF ENTRY DATE (MM/DD/YY)	09/28/2021	02/15/2022			
VISA STATUS ON 31 ST DEC 2022	E3	E3S			
ANY CHANGE IN VISA STATUS DURING THE YEAR 2022 (IF YES PLS. SPECIFY)					
MARITAL STATUS AS ON DEC 31,2022	MARRIED				
DATE OF MARRIAGE (IF APPLICABLE)	11/12/2017				
FILING STATUS (SINGLE/ MARRIED/HEAD OF HOUSEHOLD)	MARRIED				
NO. OF MONTHS STAYED IN US DURING 2022	12				
WILL YOU STAY IN US FOR MORE THAN 183 DAYS IN YEAR 2023 – (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 (470)-480-1881 OR WRITE TO sruthi@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



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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

BANK DETAILS FOR DIRECT DEPOSIT OF REFUND AMOUNT/AUTO WITHDRAWAL OF OWE AMOUNT(OPTIONAL)	
BANK NAME	
BANK ROUTING NUMBER (PAPER OR ELECTRONIC)	
BANK ACCOUNT NUMBER	
CHECKING / SAVING ACCOUNT	
ACCOUNT HOLDER NAME	

RESIDENCY DETAILS:



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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)
2022	Texas	01/01/2022	12/31/2022	2022	Texas	02/15/2022	12/31/2022
2021				2021			
2020				2020			

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 2023 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 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 2022		
Student loan interest deduction – Provide Form 1098 E		
Tuition & Fees Provide Form 1098-T		
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 2022	No	NO
Did you have more than \$50,000 in your Foreign Accounts at any time during the Tax Year 2022	NO	NO

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	
W-2's: Wages/salaries from All employers – Upload Documents	
1099-INT &1099-DIV: Interest & Dividends for All Accounts	
1099-MISC : Miscellaneous Document	
Year-End: Investment statements, Mutual Fund supplemental information	
1099-NEC : Non-Employment Document	
1099-B : Sales of Securities, Mutual Funds, etc.	
1099-C: Cancellation of Debt. Document	
1099-OID : Original Issue Discount	
1099-PATR : Taxable Distributions Received From Cooperatives	
1099-R: Income from Pension, IRAs and Annuities	
1099-G: Unemployment Compensation/State & Local income tax refund	
1099-K : Merchant Card and Third Party Network Payments	
1099-Q : Payments from qualified education programs	



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1099-SA : Distributions from a HSA
K-1 :Partnerships,Trusts,Estates and S-Corporations
Last Paystubs of the year from ALL Employers
1099-SSA/ 1099-RRB : Social Security and Railroad Retirement benefits
Scholarships, Fellowships and Grants Form 1042 S
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 01st Jan To 31st Dec)
Education Loan Interest Certificate (India) (From 01st Jan To 31st 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)



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<u>Tax Preparation Fee for TY2021</u>	
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,

Gtax file LLC. (Global Taxes team)

Phone : (323)-648-0211, whatsApp – (919)-399-3028



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Email : bhagya@gtaxfile.com

GLOBAL TAXES LLC