



## 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](mailto: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)	Chandu	Navyasree	Dakshesh		
MIDDLE NAME (PER SSN/ITIN)					
LAST NAME (PER SSN/ITIN)	Bandi	Kongara	Bandi		
SSN/ITIN NUMBER	360755139				
DATE OF BIRTH (MM/DD/YY)	05/12/1990	05/12/1993	05/27/2019		
RELATIONSHIP WITH PRIMARY TAXPAYER	Self	Husband	Son		
OCCUPATION	IT Professional	House wife			
CURRENT ADDRESS	1204 Baxter Dr, Plano Tx, 75025				
CELL NUMBER	3478768226				
ALTERNATIVE NUMBER (HOME)					

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Write to us at: [bhagya@gtaxfile.com](mailto:bhagya@gtaxfile.com) or call us at (919)-399-3028



## GLOBAL TAX

WORK NUMBER (WITH EXTENSION)					
EMAIL ADDRESS	<a href="mailto:bandi.chandu@outlook.com">bandi.chandu@outlook.com</a>	<a href="mailto:kongara.navyasree@gmail.com">kongara.navyasree@gmail.com</a>	<a href="mailto:bandi.dakshesh@gmail.com">bandi.dakshesh@gmail.com</a>		
FIRST PORT OF ENTRY DATE (MM/DD/YY)	Aug 21, 2022				
VISA STATUS ON 31 <sup>ST</sup> DEC 2022	H1B				
ANY CHANGE IN VISA STATUS DURING THE YEAR 2022 (IF YES PLS. SPECIFY)	NO				
MARITAL STATUS AS ON DEC 31,2022	Married	Married	Single		
DATE OF MARRIAGE (IF APPLICABLE)	Feb 12, 2016	Feb 12, 2016			
FILING STATUS (SINGLE/MARRIED/HEAD OF HOUSEHOLD)	Had of HouseHold	Married	Single		
NO. OF MONTHS STAYED IN US DURING 2022	5	0			
WILL YOU STAY IN US FOR MORE THAN 183 DAYS IN YEAR 2023 – (YES OR NO)	Yes	Yes	Yes		
IF ANY OTHER INFORMATION	NA	NA	NA		

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](mailto: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	AMOUNT PAID

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Kongara Navyasree	NA	Flat 202, VSR classic, Aparna Classic road, Chandanagar, Hyderabad - 500050, Telangana, India Ph: 9652083939	NA	
Bandi Baksheesh	NA	Flat 202, VSR classic, Aparna Classic road, Chandanagar, Hyderabad - 500050, Telangana, India	NA	

**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**

<b>BANK DETAILS FOR DIRECT DEPOSIT OF REFUND AMOUNT/AUTO WITHDRAWAL OF OWE AMOUNT(OPTIONAL)</b>	
BANK NAME	CHASE
BANK ROUTING NUMBER (PAPER OR ELECTRONIC)	111000614
BANK ACCOUNT NUMBER	891758093
CHECKING / SAVING ACCOUNT	CHECKING
ACCOUNT HOLDER NAME	Chandu Bandi

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**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)
2022	Texas	Aug 21,2022	Dec 31, 2022	2022			
2021				2021			
2020				2020			

Home Mortgage Interest

Home mortgage interest paid in US -*FORM	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  NO



<u>CHARITY CONTRIBUTIONS</u>					
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???	<b>NO</b>
Mandatory	
If not so, please specify who are not covered and for how many months	<b>Not in USA</b>
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	Total =Qty*Rate	Sale Date	Description of the	Qty	Rate per	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.

<u>Other Deductions – Adjustments to Income</u>		
Particulars	Taxpayer	Spouse
Educator expenses – only for Teaching profession (\$ 250)		

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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	YES	
Did you have more than \$50,000 in your Foreign Accounts at any time during the Tax Year 2022	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	
<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	

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## GLOBAL TAX

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

Refer a friend(s) to get Referral Bonus@ \$ 10 for Each paid client to us.\*\*

S.	Friend(s) Name	Friends E-mail ID	Contact Number
1			
2			

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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)**

<u>Tax Preparation Fee for TY2021</u>	
<b>Filing Status:</b> 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.

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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  
Email : [bhagya@gtaxfile.com](mailto:bhagya@gtaxfile.com)

GLOBAL TAXES LLC

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