

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 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 TY2022.

PERSONAL INFORMATION

Particulars	Primary Taxpayer	Spo use	Dependent 1 (Child-1)	Dependent 2 (Child-2)	Dependent 3 (Other dependent person)
FIRST NAME (PER SSN/ ITIN)	Sravani				
MIDDLE NAME (PER SSN/ ITIN)					
LAST NAME (PER SSN/ ITIN)	Kallepalli				
SSN/ITIN NUMBER	390-19-2954				
DATE OF BIRTH (MM/DD/ YY)	05/10/99				
RELATIONSHIP WITH PRIMARY TAXPAYER					
OCCUPATION	Investment Analyst				
CURRENT ADDRESS	253 W 93rd Street, Apt 2N, New York, NY, 10025				
CELL NUMBER	262-893-5826				
ALTERNATIVE NUMBER (HOME)					
WORK NUMBER (WITH EXTENSION)					

EMAIL ADDRESS	sravani1016@gmail.com				
FIRST PORT OF ENTRY DATE (MM/DD/YY)	N/A				
VISA STATUS ON 31 ST DEC 2022	N/A				
ANY CHANGE IN VISA STATUS DURING THE YEAR 2022 (IF YES PLS. SPECIFY)	N/A				
MARITAL STATUS AS ON DEC 31,2022	Single, not married				
DATE OF MARRIAGE (IF APPLICABLE)	N/A				
FILING STATUS (SINGLE/ MARRIED/HEAD OF HOUSEHOLD)	Single				
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	I am a US born citizen				

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)-480-1883 OR WRITE TO 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	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

BANK DETAILS FOR DIRECT DEPOSIT OF REFUND AMOUNT/AUTO WITHDRAWAL OF OWE AMOUNT(OPTIONAL)	
BANK NAME	Capital One
BANK ROUTING NUMBER (PAPER OR ELECTRONIC)	Electronic: 031176110
BANK ACCOUNT NUMBER	36134633852
CHECKING / SAVING ACCOUNT	Checking
ACCOUNT HOLDER NAME	Sravani Kallepalli

RESIDENCY DETAILS:

STATES RESIDENCY DETAILS	STATES RESIDENCY DETAILS
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GLOBAL TAX

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				2022			
2021				2021			
2020				2020			

Medical Expenses:

Prescription medications	Health insurance premiums	Doctors, Dentists, etc.	Hospitals, clinics, etc.	Eyeglasses and contact lenses	Maternity expenses, if any

Taxes Paid:

Real estate taxes	State and local Personal property taxes	Other taxes, If any	Additional State taxes paid while filing last year taxes (TY2022).

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



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

Vehicle Information

	Name of the Vehicle	Make & Model	Total miles driven in year 2022	One-way distance from Home to Office	Parking and toll	Purchase date
Taxpayer						
Taxpayer						
Spouse						

Business Assets Or Environment Saving Assets purchased:

Name of the Asset Purchased in 2022	Cost	Purchase date	Receipt Available or not

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

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.

Foreign Income and Expenses (IF Any)

Particulars	Salary income	Rental Income	Interest Income	Others (If any)
a) Amount of Foreign Income				
b) Foreign Taxes Withheld (like Form-16/16A)				

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		

FOR FBAR/FATCA

	Tax Payer(No)	Spouse (No)
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GLOBAL TAX

Did you have more than \$10,000 in your Foreign Accounts at any time during the Tax Year 2022		
Did you have more than \$50,000 in your Foreign Accounts at any time during the Tax Year 2022		

Note: You may have to FBAR (Foreign Bank Account Report) before April 18, 2023 if the aggregate of your Bank Accounts/Securities Accounts/Other Financial Accounts exceeded \$10,000 at any time during the tax year 2022. You may have to file FATCA (Foreign Account tax Compliance Act) before April 18, 2023 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 2022.

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

Duly Filled TY-2022 Tax Organizer	
W-2's: Wages/salaries from All employers – Upload Documents	
1099-INT & 1099-DIV: Interest & Dividends for All Accounts	
1099-B: Sales of Securities, Mutual Funds, etc.	
Year-End: Investment statements, Mutual Fund supplemental information	
1099-R: Income from Pension, IRAs and Annuities	
1099-G: Unemployment Compensation/state income tax refund	
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	



GLOBAL TAX

Scholarships, Fellowships and Grants Form 1042 S	
Foreign Tax certificate (if you made any income from foreign country during 2022)	
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			