**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](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 TY2022.

**PERSONALINFORMATION**

|  |  |
| --- | --- |
| **Particulars** | **Primary Taxpayer** |
| **FIRST NAME (PER SSN/ITIN)** | **Venkata Bhanu Pratap** |
| **MIDDLE NAME (PER SSN/ITIN)** |  |
| **LAST NAME (PER SSN/ITIN)** | **Bommineni** |
| **SSN/ITIN NUMBER** | **211-98-3312** |
| **DATE OF BIRTH (MM/DD/YY)** | **07/04/1994** |
| **RELATIONSHIP WITH PRIMARY TAXPAYER** |  |
| **OCCUPATION** | **Software Engineer** |
| **CURRENT ADDRESS** | **790 Haddonstone Cir, Apt 200**  **Heathrow, FL 32746, USA** |
| **CELL NUMBER** | **774 333 2242** |
| **ALTERNATIVE NUMBER (HOME)** | **-** |
| **WORK NUMBER (WITH EXTENSION)** | **-** |
| **EMAIL ADDRESS** | **vebomm@gmail.com** |
| **FIRST PORT OF ENTRY DATE (MM/DD/YY)** | **2017-11-01 BOS** |
| **VISA STATUS ON 31ST DEC 2022** | **H1B** |
| **ANY CHANGE IN VISA STATUS DURING THE YEAR 2022 (IF YES PLS. SPECIFY)** | **NO** |
| **MARITAL STATUS AS ON**  **DEC 31,2022** | **SINGLE** |
| **DATE OF MARRIAGE (IF APPLICABLE)** | **-** |
| **FILING STATUS (SINGLE/MARRIED/HEAD OF HOUSEHOLD)** | **SINGLE** |
| **NO. OF MONTHS STAYED IN US DURING 2022** | **8 Months** |
| **WILL YOU STAY IN US FOR MORE THAN 183 DAYS IN YEAR 2023 – (YES OR NO)** | **YES** |
| **IF ANY OTHER INFORMATION** | **Please look into capital losses from 2020** |

**BANK ACCOUNT DETAILS**

|  |  |
| --- | --- |
| **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) | **011900254** |
| BANK ACCOUNT NUMBER | **3850 1891 0315** |
| CHECKING / SAVING ACCOUNT | **CHECKING** |
| ACCOUNT HOLDER NAME | **VENKATA BHANU PRATAP, BOMMINENI** |

**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** | **KY**  **FL** | **2022-05-16**  **2022-05-16** | **2022-05-16**  **2022-12-31** | **2022** |  |  |  |
| **2021** | KY |  |  | **2021** |  |  |  |
| **2020** | KY |  |  | **2020** |  |  |  |

**Medical Expenses:**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Prescription medications** | **Health insurance premiums** | **Doctors, Dentists, etc.** | **Hospitals, clinics, etc.** | **Eyeglasses and contact lenses** | **Maternity expenses if any** |
|  | **3201.24** |  |  |  |  |
|  |  |  |  |  |  |

**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).** |
|  | **277.13**  **Property Tax Volusia County Tax Collector, FL** |  |  |

**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

**HEALTH INSURANCE:**

|  |  |
| --- | --- |
| **Are you and your dependents covered under Health Coverage as per Federal laws??? Mandatory** | **Yes** |
|  |  |
| **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 From 1099-HC.** |  |

**Foreign Income and Expenses (IF Any)**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Particulars** | **Salary income** | **Rental Income** | **Interest Income** | **Others (If any)** |
| 1. **Amount of Foreign Income** |  |  |  |  |
| 1. **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)** |
| **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 | Uploaded Documents |
| **1099-INT &1099-DIV**: Interest & Dividends for All Accounts | Uploaded Documents |
| **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 |  |
| **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)** |  |