|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **PARTICULARS** | **PRIMARY**  **TAX PAYER** | **SPOUSE** | **CHILD 1** | **CHILD 2** | **OTHER DEPENDENT** |
| FIRST NAME (AS PER SSN) | MOHAN KRISHNA AYYAPPA |  |  |  |  |
| MIDDLE NAME (AS PER SSN) |  |  |  |  |  |
| LAST NAME (AS PER SSN) | CHINTA |  |  |  |  |
| DATE OF BIRTH (MM/DD/YY) | 01/07/1999 |  |  |  |  |
| SSN/ITIN | 1270 |  |  |  |  |
| OCCUPATION | EMPLOYED |  |  |  |  |
| MOBILE NUMBER | 469 626 7959 |  |  |  |  |
| WORK PHONE NUMBER (EXTENSION, IF ANY) |  |  |  |  |  |
| E-MAIL | MOHANUSA@GMAIL.COM |  |  |  |  |
| RELATIONSHIP WITH PRIMARY TAX PAYER  (SON/DAUGHTER/PARENTS) |  |  |  |  |  |
| VISA TYPE AS ON 12/31/2023 | OPT |  |  |  |  |
| WAS THERE ANY CHANGES IN YOUR VISA STATUS DURING 2023? IF YES, THEN MENTION DATE | I CAME FROM F1 TO OPT |  |  |  |  |
| MARRIED/WIDOWED/SEPARATED/DIVORCED/SINGLE |  |  |  |  |  |
| DATE OF MARRIAGE (MM/DD/YY) |  |  |  |  |  |
| MANDATORY: CURRENT ADDRESS WITH ZIP CODE. | 75038 |  |  |  |  |
| FIRST PORT OF ENTRY IN THE U.S. (MM/DD/YY) | 12/15/2021 |  |  |  |  |
| WILL YOU STAY IN THE U.S. FOR MORE THAN 6 MONTHS IN 2024? (YES/NO) | YES |  |  |  |  |
| TOTAL NUMBER OF MONTHS STAYED IN THE U.S. DURING 2023 | 12 |  |  |  |  |

ADVANCE CHILD TAX CREDIT PAYMENTS INFO:

IF YOU RECEIVED ANY ADVANCE CHILD TAX CREDIT PAYMENTS OF $250 OR $300 PER CHILD IN 2023. PROVIDE THE FOLLOWING INFORMATION.

|  |  |  |
| --- | --- | --- |
| MONTHS OF 2023 | NUMBER OF MONTHS RECEIVED | TOTAL AMOUNT RECEIVED |
| JANUARY TO DECEMBER |  |  |

NOTE: PLEASE EMAIL US OR UPLOAD LETTER 6419 ON [HTTP://WWW.QUESSTAXFILING.COM](http://www.Quesstaxfiling.com)

MANDATORY: MENTION YOUR TOTAL NUMBER OF PRESENT DAYS FOR THE YEARS 2021, 2022 & 2023, THIS HELPS US TO DEFINE WHETHER YOU WERE A RESIDENT/NON-RESIDENT FOR THE STATE OR FEDERAL.

RESIDED/RESIDING STATE/STATES DETAILS:

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| TAX YEAR | STATE | TAXPAYER | | STATE | SPOUSE | |
| FROM  (MM/DD/YYYY) | TO  (MM/DD/YYYY) | FROM (MM/DD/YYYY) | TO (MM/DD/YYYY) |
| 2023 | TEXAS |  |  |  |  |  |
| 2023 | MISSOURI |  |  |  |  |  |
| 2022 |  |  |  |  |  |  |
| 2021 |  |  |  |  |  |  |

NOTE: YOU MIGHT HAVE TO FILE CITY/COUNTRY TAXES, IF YOU HAVE RESIDED IN KENTUCKY, MICHIGAN, NEW YORK, OHIO, PENNSYLVANIA, INDIANA, IOWA, OR MARYLAND.

**CHILD & DEPENDENT CARE EXPENSES:**

|  |  |
| --- | --- |
| (DAY-CARE EXPENSES CAN BE CLAIMED IF YOUR SPOUSE IS WORKING OR A FULL-TIME STUDENT) | |
| A) NAME OF THE DEPENDENT FOR WHOM THESE EXPENSES  WERE INCURRED |  |
| B) NAME OF THE INSTITUTION/PERSON TO WHOM THE AMOUNT WAS PAID |  |
| C) FEDERAL ID/SSN OF THE INSTITUTION/PERSON TO WHOM THE MONEY WAS PAID |  |
| D) INSTITUTION ADDRESS (STREET ADDRESS, CITY, STATE, ZIP CODE) |  |
| E) TOTAL EXPENDITURE AMOUNT |  |
| F) ANY AMOUNT REIMBURSED BY YOUR EMPLOYER |  |

BANK ACCOUNT DETAILS FOR DIRECT DEPOSIT OF REFUND / DIRECT DEBIT OF TAX DUE AMOUNT

|  |  |
| --- | --- |
| (FOR DEPOSIT OF REFUND / AUTO WITHDRAWAL OF OWE AMOUNT) | |
| BANK NAME |  |
| ACCOUNT NUMBER |  |
| ROUTING NUMBER (ELECTRONIC ONLY) |  |
| ACCOUNT TYPE (SAVINGS/CHECKING) |  |
| ACCOUNT OWNER NAME |  |

HSA / IRA CONTRIBUTIONS:

|  |  |  |
| --- | --- | --- |
| EXPENSE TYPE | TAXPAYER  $AMOUNT | SPOUSE  $AMOUNT |
| A) CONTRIBUTIONS TO HSA – (HEALTH SAVINGS ACCOUNT) - PROVIDE SUPPORTING DOCUMENT) |  |  |
| B) CONTRIBUTIONS TO TRADITIONAL IRA (INDIVIDUAL RETIREMENT ACCOUNT) – (THIS IS NOT 401K PROVIDED BY YOUR EMPLOYER. IF ROTH IRA, PLEASE MENTION ROTH IRA) |  |  |

CHARITABLE CONTRIBUTION:

|  |  |  |  |
| --- | --- | --- | --- |
| S.NO | NAME OF THE CHARITABLE INSTITUTION | AMOUNT DONATED |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

EXPENSES YOU INCURRED IN 2023:

|  |  |  |
| --- | --- | --- |
| TYPE OF EXPENSES | TAXPAYER  $ AMOUNT | SPOUSE  $ AMOUNT |
| 1. LAST YEAR TAX PREPARATION FEES |  |  |
| 1. HOME MORTGAGE INTEREST & POINTS (FOR PROPERTY IN THE US) - PROVIDE FORM 1098 - ENTER ONLY THE INTEREST AMOUNT, NOT THE EMI. |  |  |
| 1. PROPERTY TAXES (FOR PROPERTY IN THE US). |  |  |
| 1. PROPERTY TAXES (FOR PROPERTY IN INDIA). |  |  |
| 1. EDUCATOR EXPENSES (IF YOU/YOUR SPOUSE IS A TEACHER/FACULTY). |  |  |
| 1. MEDICAL EXPENSES. |  |  |
| 1. ANY STATE REFUNDS FOR TY2022? |  |  |
| 1. COST OF ENERGY SAVING EQUIPMENT (EX: SOLAR WATER HEATER, BOILER, SKYLIGHTS, ELECTRIC HEAT PUMP, NATURAL GAS PROPANE, METAL ROOFING, WOODEN FURNACE, ETC.,) - MENTION EQUIPMENT PURCHASED & COST. |  |  |
| 1. ANY OTHER EXPENSES NOT LISTED ABOVE. |  |  |
| 1. CAPITAL GAIN 2023. |  |  |
| 1. CAPITAL (LOSS) 2023. |  |  |
| 1. CAPITAL (LOSS) CARRY FORWARD OF 2021 & 2022,   IF YOU DO NOT REMEMBER, KINDLY SEND US YOUR 2021 TAX RETURNS. |  |  |

MANDATORY: EMAIL US OR UPLOAD THE BELOW-MENTIONED SOURCE DOCUMENTS OF INCOME & EXPENSES, IF YOU HAVE NOT RECEIVED THE SOURCE DOCUMENTS YET, THEN MENTION THE AMOUNT OF INCOME AND EXPENSES AS PER YOUR KNOWLEDGE.

NOTE: THE IRS AND STATE HAVE INFORMATION ABOUT YOUR BELOW-MENTIONED SOURCE OF INCOME DOCUMENTS, SO PLEASE DO NOT MISS REPORTING THEM. ONCE YOUR TAX RETURN IS SUBMITTED TO THE IRS, THE IRS WILL CROSS VERIFY THE REPORTED INCOME WITH THE SOURCE OF INCOME DOCUMENTS IN ITS DATABASE, IF THE SOURCE OF INCOME DOES NOT MATCH WITH THE IRS DATABASE, THEN THE IRS WILL SEND YOU A PENALTY AND INTEREST NOTICE, SO LET US AVOID UNCOMFORTABLE SITUATIONS.

|  |  |
| --- | --- |
| DID YOU OR YOUR SPOUSE HAVE ANY OF THE BELOW FORMS | MENTION YES/NO & ALSO PROVIDE US THE DOCS |
| 1098 (MORTGAGE INTEREST STATEMENT) |  |
| 1098 – T (TUITION FEES PAID IN THE US - PROVIDE FORM 1098-T RESIDENT ALIENS AND CITIZENS) |  |
| 1098 – E (STUDENT LOAN INTEREST STATEMENT) |  |
| 1099 – B (PROCEEDS FROM BROKER AND BARTER EXCHANGE TRANSACTIONS)  (\*MANDATORY CONSOLIDATED FORM/SUPPLEMENTAL INFORMATION/EMPLOYER STOCK FORMS (ESPP/RSU/3921 & 3922 FORMS) |  |
| 1099 -C (CANCELLATION OF DEBT) |  |
| 1099 – DIV (DIVIDENDS AND DISTRIBUTIONS) |  |
| 1099 – G (CERTAIN GOVERNMENT PAYMENTS) |  |
| 1099 – HC (NOTE: IF YOU ARE A RESIDENT OF MA STATE AND HAVING HEALTH INSURANCE, PLEASE PROVIDE FORM MA 1099-HC) |  |
| 1099 – INT (INTEREST INCOME STATEMENT) |  |
| 1099 – K (PAYMENT CARD AND THIRD-PARTY NETWORK TRANSACTIONS) |  |
| 1099 – MISC (MISCELLANEOUS INCOME STATEMENT) |  |
| 1099 – OID (ORIGINAL ISSUE DISCOUNT) |  |
| 1099 – Q (PAYMENTS FROM QUALIFIED EDUCATION PROGRAMS UNDER SECTIONS 529 AND 530) |  |
| 1099 – R (DISTRIBUTIONS FROM PENSIONS, ANNUITIES, RETIREMENT OR PROFIT-SHARING PLANS, IRAS, INSURANCE CONTRACTS, ETC.) |  |
| 1099-SA (DISTRIBUTIONS FROM AN HSA, ARCHER MSA, OR MEDICARE ADVANTAGE MSA) |  |
| W2 - G (CERTAIN GAMBLING WINNINGS) |  |
| 1095 – A (HEALTH INSURANCE FROM MARKET PLACE) |  |

RENTAL INCOME:

|  |  |
| --- | --- |
| PARTICULARS | DETAILS |
| 1. PROPERTY TYPE? (RESIDENTIAL/COMMERCIAL) |  |
| 1. LOCATION/ADDRESS |  |
| 1. SPECIFY THE FOLLOWING: 2. NO. OF MONTHS RENTED IN THE YEAR 2023 3. NO. OF MONTHS YOU USED FOR PERSONAL PURPOSE |  |
| 1. PROPERTY IS OWNED BY (TAXPAYER/SPOUSE/JOINT) |  |
| 1. PROPERTY PURCHASED DATE (MM/DD/YYYY) |  |
| 1. COST OF THE PROPERTY |  |
| 1. TOTAL RENTAL INCOME RECEIVED |  |
| 1. EXPENSES INCURRED ON A PROPERTY TO EARN RENT |  |

OTHER INCOME:

|  |  |  |
| --- | --- | --- |
| INCOME TYPE | TAXPAYER  $ AMOUNT | SPOUSE  $ AMOUNT |
| 1) SELF-EMPLOYMENT INCOME – FORM 1099-MISC |  |  |
| 2) GAMBLING INCOME |  |  |
| 3) GAMBLING LOSSES (GAMBLING LOSSES CAN BE CLAIMABLE UP TO THE GAMBLING INCOME) |  |  |

FBAR / FATCA:

|  |  |  |
| --- | --- | --- |
|  | TAXPAYER (YES/NO) | SPOUSE (YES/NO) |
| FBAR REPORTING: DID YOU HAVE MORE THAN $10,000 IN YOUR FOREIGN ACCOUNTS AT ANY TIME DURING THE TAX YEAR 2023? |  |  |
| FATCA FILING: DID YOU HAVE MORE THAN $50,000 IN YOUR FOREIGN ACCOUNTS AT ANY TIME DURING THE TAX YEAR 2023? |  |  |

MANDATORY REPORTING: REPORT FBAR/FATCA, IF YOUR FOREIGN (INDIA) FINANCIAL ACCOUNTS LIKE BANK ACCOUNTS/FIXED DEPOSITS/RECURRING ACCOUNTS/BONDS/TRADITIONAL INSURANCE POLICIES/UNIT LINKED POLICIES/MUTUAL FUNDS/SECURITIES ETC., NEED TO REPORT FBAR ACCOUNTS VALUE OVER $10,000 AND FATCA $50,000-$1,00,000. NON-REPORTING FBAR AND NON-FILING OF FBAR & FATCA WILL ATTRACT CIVIL LEGAL CASES & PENALTIES BETWEEN $12,921 TO $129,210 OR 50% OF THE ACCOUNT BALANCE, WHICHEVER IS HIGHER!

REPORT FOREIGN INCOME:

NOTE: YOU NEED TO REPORT YOUR FOREIGN (INDIA) INCOME AND PAID INCOME TAXES, IF YOU ARE FILING FORM 1040 OR EVEN IF YOU ARE REPORTING FBAR/FATCA, THE REPORTABLE INCOME IS INTEREST, DIVIDENDS, RENTS, ROYALTIES, ETC., BECAUSE IRS CAN KNOW YOUR FOREIGN INCOME DUE TO ITS GOOD RELATIONS WITH THE FOREIGN INCOME TAX DEPARTMENTS. SO PLEASE AVOID OBSTRUCTIONS IN YOUR GREEN CARD APPROVAL/RENEWALS BY REPORTING YOUR FOREIGN (INDIA) ANY TYPE OF INCOME.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| PARTICULARS | SALARY INCOME (INR) | DIVIDEND INCOME (INR) | INTEREST INCOME (INR) | RENTAL INCOME (INR) |
| 1. FOREIGN INCOME FROM WHICH SOURCE (INCLUDING INTEREST FROM FOREIGN BANKS) |  |  |  |  |
| 1. AMOUNT OF FOREIGN INCOME |  |  |  |  |
| 1. FOREIGN TAXES OTHER THAN US TAXES (IF ANY) WITHHELD |  |  |  |  |

NOTES TO TAX PREPARER: MENTION ADDITIONAL INFORMATION, SERVICE IMPROVEMENT, BEST WAY AND TIME TO REACH YOU, OR ANY KIND OF FEEDBACK OR EXPECTATION, YOU WILL HAVE OUR SPONTANEOUS RESPONSE.

|  |
| --- |
|  |

MANDATORY: WE REQUIRE ALL YOUR TAX SOURCE DOCUMENTS FOR THE PREPARATION OF YOUR TAX RETURN.

|  |
| --- |
| FORM W2 / W2C (MANDATORY)  ALL 1099 DOCUMENTS LIKE 1099-INT, 1099-DIV, 1099B, 1099-MISC, 1099-G,1099-R |
| LAST YEAR FEDERAL & STATE TAX RETURN (MANDATORY) |
| ESTIMATED TAX PAYMENTS – FORM 1040ES |
| INCOME FROM S-CORP/LLP/LLC – SCHEDULE K1 |

PLEASE HELP US WITH YOUR FRIENDS AND COLLEAGUES’ CONTACT DETAILS BELOW TO HELP THEM ENJOY OUR BELOW-MENTIONED TAX SERVICES WORTH $2,000 FOR FREE OF COST, IF THEY FILE THROUGH US, WE WILL HONOUR YOU WITH $10 PER PAID REFERRAL.

|  |  |  |
| --- | --- | --- |
| **NAME OF YOUR FRIENDS, FAMILY AND COLLEAGUES** | **EMAIL ADDRESS** | **CONTACT NUMBERS** |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

* **IN CASE OF ANY AUDIT TAX PAYER NEED TO FURNISH THE DOCUMENTS AS PER IRS GUIDE LINES TO SUBSTANTIATE THE CLAIM MADE ON THE TAX RETURN.**

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!

|  |  |  |
| --- | --- | --- |
| **photo** | |  | | --- | | **QUESS TAX FILING WWW.QUESSTAXFILING.COM | SUPPORT@QUESSTAXFILING.COM CONTACT: +1 207-307-2555** | |