**CLIENT TAX NOTES – TY2023**

**PERSONAL INFORMATION:**

1. LAST NAME: Joshi

2. MIDDLE NAME:

3. FIRST NAME: Darshan

4. SSN: 783 36 4759

5. OCCUPATION: IT Manager

6. DOB: 04/20/1982

7. EMAIL ID: [darshan.dj3@gmail.com](mailto:darshan.dj3@gmail.com)

8. CONTACT NO: 209 252 1908

9. CURRENT ADDRESS: 7649 Chester Dawson way, Elk Grove, CA 95757

10. MARITAL STATUS ON 31ST DEC 2023: Married

11. VISA TYPE ON 31ST DEC 2023: H1B

12. NO OF MONTHS STAYED IN US IN THE YEAR 2023: 12

13. STATE LIVED IN US IN 2023(MENTION NAME & DATE IF LIVED MORE THAN ONE STATE): AZ

14.ANY LOANS IN INDIA OR USA: Mortgage loan in US

15.FIRST PORT OF ENTRY DATE (YEAR)TO USA: 2014

16. IS THIS FIRST TIME FILING (YES/NO) : No

**SPOUSE DETAILS:**

1. LAST NAME: Kalla

2. FIRST NAME: Amrita

3. ITIN/SSN: 892 20 6384

4. DOB: 11/18/1986

5. OCCUPATION: IT Consultant

6.VISA TYPE : H1B till 2023, now H4 with EAD

7. EMAIL ID: [darshanamrita@gmail.com](mailto:darshanamrita@gmail.com)

8.CONTACT NO: 209 252 4715

**KIDS DETAILS:**

1. LAST NAME: Joshi

2. FIRST NAME: Amaya

3. ITIN/SSN: 796 07 1315

4. DOB: 12/05/2018

**KIDS DETAILS:**

1.Last name: Joshi

2. First name: Anaya

3. ITIN/SSN: 100 43 9846

4. DOB: 10/28/2022

Notes

1. IRA contributions for both Darshan and Amrita are $6500 for 2023 (Fidelity receipts are not updated yet)
2. Solar expense is listed in the sales agreement with builder, which was $27,849