|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Particulars** | **Taxpayer (as per SSN)** |  | **Particulars** | **Spouse (as per SSN )** |
| First Name | Prasad | First Name | Sujata Kumari |
| Middle Name |  | Middle Name |  |
| Last Name | Damoder | Last Name | Damoder |
| SSN/ITIN | 021-25-1793 | SSN/ITIN | 441-65-4370 |
| Date of Birth | 16th Oct, 1966 | Date of Birth | 20th May 1969 |
| Occupation | Information Technology | Occupation | Business Owner |
| Visa Type as on Dec 31, 2023 | US Citizen | Visa Type as on Dec 31, 2023 | US Citizen |
| Were there any changes in the visa status during 2023? Mention dates | No | Were there any changes in the visa status during 2023? Mention dates | No |
| Marital status as on Dec 31, 2023 | Married | Marital status on Dec 31, 2023 | Married |
| Current Address | 2400 Giralda Cir E, Apt 103, Palm Beach Gardens, FL, 33410 | Current Address | 2400 Giralda Cir E, Apt 103, Palm Beach Gardens, FL, 33410 |
| First Port of Entry Date into US (mm/dd/yy) | 5th May, 2012 | First Port of Entry Date into US (mm/dd/yy) | 5th June, 2012 |
| No. of months stayed in US during 2023 | 11 | No. of months stayed in US during 2023 | 12 |
| Will you stay in US for more than 6 months in 2023? (Write Yes or No) | No | Will you stay in US for more than 6 months in 2023? (Write Yes or No) | No |

**Contact Info:**

|  |  |  |
| --- | --- | --- |
|  | **Taxpayer** | **Spouse** |
| Cell Number | 479-381-7190 | 813-947-4818 |
| Work Number (With Extension) | 479-381-7190 | 813-947-4818 |
| Home Number | 479-381-7190 | 813-947-4818 |
| Email Id | Damoderprasad09@gmail.com | dsujatakumari@gmail.com |

**Child and Dependent Details**

|  |  |  |  |
| --- | --- | --- | --- |
| **Particulars** | **Child 1** | **Child 2** | **Any other dependent** |
| First Name | NA | NA | NA |
| Middle Name |  |  |  |
| Last Name |  |  |  |
| Date of Birth (mm/dd/yy) |  |  |  |
| SSN/ITIN |  |  |  |
| How are you related to Primary Taxpayer? |  |  |  |
| Visa Type as on Dec 31, 2022, |  |  |  |
| First Port of Entry Date into US (mm/dd/yy) |  |  |  |
| No. of months stayed in US during 2022 |  |  |  |
| Will you stay in US for more than 6 months in 2022?  (Write Yes or No) |  |  |  |

**Residency Details**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Taxpayer** | **Taxpayer** | | **Spouse** | |
| States Resided | Period of Stay  (From Date & To Date/Till Date) | States Resided | Period of Stay  (From Date & To Date/Till Date) |
| 2023 | FL |  | FL |  |
| 2022 | FL |  | FL |  |
| 2021 | FL |  | FL |  |
| 2020 | FL |  | FL |  |

**Employment Details**

|  |  |  |
| --- | --- | --- |
|  | **Taxpayer** | **Spouse** |
| Name of the Employer | Next Era Energy | Sujis Eyebrow Threading |
| Employer Location (City, State) | Juno Beach, FL | West Palm Beach, FL |
| Designation | IT Architect | Business Owner |
| Occupation/Domain | Information Technology |  |
| Employment Start Date |  |  |
| Employment End Date |  |  |
| Visa Status | US Citizen | US Citizen |
| **Do you work at Employer Location (or) at Client Location on projects/assignments?** | Full time employee at Employer location |  |

|  |  |  |
| --- | --- | --- |
| **Expenses Type** | **Taxpayer $ Amount** | **Spouse $ Amount** |
| 1. Last Year Tax Preparation Fees |  |  |
| 1. Home Mortgage Interest & Points (For property in US) - Provide Form 1098 - Enter only the Interest Amount not your EMI |  |  |
| 1. Property Taxes (For property in US) |  |  |
| 1. Home Mortgage Interest (For property in India/Foreign Country) - Please mention Bank Name, Bank Address & Interest Amount in USD - Provide only Interest Amount not your EMI |  |  |
| 1. Property Taxes (For property in India) |  |  |
| 1. Contributions to Traditional IRA (Individual Retirement Account) - This is not 401K provided by your Employer. If Roth IRA, please mention Roth IRA |  |  |
| 1. Contributions to HSA (Health Savings Account) - Provide Supporting Doc |  |  |
| 1. Medical Expenses (Read Note Below) |  |  |
| 1. Last year State Income Taxes Paid |  |  |
| 1. Cost of Energy Saving Equipment (E.g. Solar Water Heater, Boiler, Skylights, Electric Heat Pump, Natural Gas Propane, Metal Roofing, Wooden Furnace, etc.) - Mention Equipment Purchased & Cost |  |  |
| 1. Sales & Excise Tax paid on the vehicle bought in Tax Year 2022 |  |  |
| 1. Other Expenses |  |  |

**Child & Dependent Care Expenses:**  Enter the below details only if Spouse is working or Full-time student or disabled. (Enter the expenses incurred for day care / preschool / nursery)

|  |  |
| --- | --- |
|  | |
| 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 amount was paid |  |
| d. Address of the Institution (Street Address, City, State, Zip code) |  |
| e. Amount of Expenditure Incurred |  |
| f. Amount reimbursed by the Employer, if any |  |

**Charitable Contributions:**

|  |  |  |
| --- | --- | --- |
| S. no | Name of the Charitable Institution | Amount Donated |
| 1 |  |  |
| 2 |  |  |

**Note:** Please maintain Receipts to support your claims.

**Investments – Sale & Purchase of Stocks:**

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Purchase Details | | | | | Sale Details | | | | |
| Date Purchased | Stock Description | Quantity | Rate per Unit | Total = Qty \* Rate | Date Sold | Stock Description | Quantity | Rate per Unit | Total = Qty \* Rate |
|  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |

**Note:** If you have more than 20 Transactions, please send us the sale & purchase details in an excel sheet with columns listed above. Please note that you may be charged $5 for each extra page of your Schedule D while the first page is FREE

**Rental Income (If Any):**

Note: Please fill in these details if you had any Rental Income from your Residential/Commercial Property in US

|  |  |
| --- | --- |
| Particulars | Details |
| 1. Property Type? (Residential/Commercial) |  |
| 1. Location/Address |  |
| 1. Specify the following: 2. No. of months rented in year 2023 3. No. of months you used for personal purpose |  |
| 1. Property is owned by (Taxpayer/Spouse/Joint) |  |
| 1. Date this property was purchased (mm/dd/yy) |  |
| 1. Cost of the property |  |
| 1. Rental Income received |  |
| 1. Rental Expenses incurred to earn rent, if any |  |

**Foreign Income & Expenses (If Any):**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Particulars | Salary Income | Dividend Income | Interest Income | Rental Income |
| Foreign Income |  |  |  |  |
| Foreign Taxes Paid |  |  |  |  |

**FBAR/FATCA:**

|  |  |  |
| --- | --- | --- |
|  | Taxpayer (Yes/No) | Spouse (Yes/No) |
| Did you have more than $10,000 in your Foreign Accounts at any time during the Tax Year 2023? |  |  |
| Did you have more than $50,000 in your Foreign Accounts at any time during the Tax Year 2023? |  |  |

Please Upload/Fax/Email the Following Tax Docs along with This Organizer:

|  |
| --- |
|  |
| * Duly Filled in Tax Organizer of 2023 (mandatory) |
| * Wage Income – Form W2/Corrected W2 (mandatory) |
| * Last Year Federal & State Tax Return (mandatory) |
| * Any other tax related documents (1099Int, 1099 Div, 1099B, 1099Misc, 1099G, 1099R, FTC, (Health Coverage 1095A,B,C) |