TAX ORGANIZER-TY-2023

FIRST NAME: INDRADIP
LAST NAME: ADHIKARI
SSN: 743-92-6752
DOB: FEB 12, 1984
OCCUPATION: SR. MANAGER, SOFTWARE ENGINEERING. (W2)
EMAIL ID: DIP.INDRA84@GMAIL.COM
CONTACT NO: +1 (612) 298-1168
CURRENT ADDRESS: 9976 VERVAIN DR, EDEN PRAIRIE, MN 55347.
VISA STATUS ON 31ST DEC 2023: H-1B. CURRENT VISA EXPIRING ON APRIL 25, 2026.
FIRST PORT OF ENTRY DATE TO THE USA: JANUARY 20, 2014.
MARITAL STATUS ON 31ST DEC 2023: MARRIED.
NO. OF MONTHS STAYED IN US IN THE YEAR 2023: 12 MONTHS
STATE LIVED IN US IN 2023(MENTION STATE & MONTHS IF LIVED MORE THAN ONE STATE): MINNESOTA
ANY LOANS IN INDIA OR USA:  YES. PLS SEE BELOW.

**LOANS IN INDIA:**

1. 1 HOUSING LOAN (DOCUMENTS IN THE ATTACHMENT).
2. 1 PERSONAL LOAN - PLEASE LET ME KNOW IF YOU NEED THE DOCUMENTATION FOR THAT.

**LOAN IN USA:**

1. HOME LOAN IN MY SPOUSE'S NAME, FIRST TIME HOME BUYER IN 2023. 2 MORTGAGE INTEREST FORM-1098 ARE ATTACHED. PROPERTY TAX STATEMENT AND PROPERTY TAX REBATE (1099-MISC) DOCUMENTS ARE ATTACHED.

**SPOUSE DETAILS:**
FIRST NAME: IPSITA
LAST NAME: ADHYA
SSN/ITIN: 872-29-0250
DOB: MAY 18, 1983
OCCUPATION: SOFTWARE DEVELOPMENT ENGINEER (W2)

**DEPENDENT DETAILS:**

DEPENDENT 1:
FIRST NAME: AARUSHI
LAST NAME: ADHIKARI
SSN/ITIN: 801-93-1880
DOB: APRIL 19, 2014

DEPENDENT 2:
FIRST NAME: AAYANSH
LAST NAME: ADHIKARI
SSN/ITIN: 831-50-0849
DOB: NOVEMBER 28, 2018.

**SPECIAL SITUATION TO BE CONSIDERED :**

**INVESTMENTS :**

**1. I HAD CAPITAL LOSS FROM PREVIOUS YEAR'S (2022) TAX FILING. PLEASE SEE PREVIOUS YEAR'S TAX RETURN FOR DETAILS AND ACCOUNT FOR THE SAME.**

**2. I HAVE CAPITAL LOSS FROM LAST YEAR (2023). PLEASE ACCOUNT FOR THE SAME. DETAILS ARE AVAILABLE IN THE ATTACHMENT UNDER INVESTMENT FOLDER.**

**DEBT:**

**1. I HAD DEBT CONSOLIDATION LOAN IN 2023 AND HAVE CANCELLATION OF DEBT FROM TWO CREDITORS. BOTH THE 1099-C ARE ATTACHED. FORM 982 MAY NEED TO BE SUBMITTED WITH**DISCHARGE OF INDEBTEDNESS TO THE EXTENT INSOLVENT (NOT IN A TITLE 11 CASE)

**CHILD AND DEPENDENT CARE EXPENSES FORM 2441**

I AM EXPECTING TO RECEIVE THE TAX STATEMENT FROM THE CHILD CARE ON MONDAY. PLEASE ACCOUNT FOR IT WHEN IT'S AVAILABLE

FOR ANY QUESTIONS, PLEASE DO NOT HESITATE TO LET ME KNOW ON MY CELL PHONE.

I'D BE CURIOUS TO KNOW THE REFUND AMOUNT, YOUR FEES AND WHAT KIND OF LEGAL SERVICES YOUR COMPANY WILL PROVIDE IN CASE THERE IS AN IRS AUDIT.