

## CLIENT TAX NOTES – TY2019

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 TY2019.

### Simple 5 Steps to file your taxes with IRS.

**Step 1:** Fill this Tax Notes form and upload it in your login or email it to us

**Step 2:** upload all income related documents like W2, 1099 INT, DIV, MISC, 1099 B, Etc...

**Step 3:** we will prepare your tax return estimation and send you the documents for your review

**Step 4:** once you review your documents, you have to pay our service charges.

**Step 5:** Give confirmation to file your taxes.

## PERSONAL INFORMATION

Particulars	Primary Taxpayer	Spouse	Dependent 1 (Child1)	Dependent 2 (Child -2)	Dependent 3 (Other dependent person)
FIRST NAME (PER SSN/ ITIN)	Vikram	Shakuntala			
MIDDLE NAME (PER SSN/ ITIN)					
LAST NAME (PER SSN/ ITIN)	Selvamani	Jeyaraj			
SSN/ITIN NUMBER	538-63-3705	037-41-4167			
DATE OF BIRTH (MM/DD/ YY)	11/16/1979	08/22/1975			
RELATIONSHIP WITH PRIMARY TAXPAYER	SELF	SPOUSE			
OCCUPATION	IT Project Manager	Import Export Associate			



# GLOBAL TAX

<b>CURRENT ADDRESS</b>	<b>2 Radio Ave Apt A7 Secaucus NJ 07094</b>	<b>2 Radio Ave Apt A7 Secaucus NJ 07094</b>			
<b>CELL NUMBER</b>	<b>609-213-8394</b>				
<b>ALTERNATIVE NUMBER (HOME)</b>					
<b>WORK NUMBER (WITH EXTENSION)</b>					
<b>EMAIL ADDRESS</b>	<a href="mailto:vikram.selvamani@gmail.com">vikram.selvamani@gmail.com</a>	<a href="mailto:shakuntala.j@gmail.co">shakuntala.j@gmail.co</a>			
<b>FIRST PORT OF ENTRY DATE (MM/DD/YY)</b>					
<b>VISA STATUS ON 31<sup>ST</sup> DEC 2019</b>					
<b>ANY CHANGE IN VISA STATUS DURING THE YEAR 2019 (IF YES PLS. SPECIFY)</b>	<b>No change</b>	<b>No change</b>			
<b>MARITAL STATUS AS ON DEC 31,2019</b>	<b>Married</b>	<b>Marrried</b>			
<b>DATE OF MARRIAGE (IF APPLICABLE)</b>	<b>06/04/2009</b>	<b>06/04/2009</b>			
<b>FILING STATUS (SINGLE/ MARRIED/HEAD OF HOUSEHOLD)</b>	<b>Married</b>	<b>Married</b>			
<b>NO. OF MONTHS STAYED IN US DURING 2019</b>	<b>12</b>	<b>12</b>			
<b>WILL YOU STAY IN US FOR MORE THAN 183 DAYS IN YEAR 2020 – (YES OR NO)</b>	<b>Yes</b>	<b>Yes</b>			

<b>IF ANY OTHER INFORMATION</b>					
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**NOTE: IF YOU DO NOT HAVE AN SSN FOR YOUR SPOUSE/DEPENDENTS WE CAN APPLY FOR ITIN. FOR ITIN APPLICATION PROCESSING PLEASE REACH US ON (415)-373-1661 OR WRITE TO ITIN@GTAXFILE.COM**

**CHILD AND DEPENDENT CARE EXPENSES PROVIDER DETAILS -**

<b>DEPENDENT NAME</b>	<b>NAME OF THE ORGANIZATION</b>	<b>ADDRESS WITH PHONE NUMBER</b>	<b>FEDERAL ID NUMBER (EIN / SSN) OF THE ORGANIZATION / PERSON WHO PROVIDED THE CARE.</b>	<b>AMOUNT PAID</b>

**1. DEPENDENTS UNDER AGE 24 WITH UNEARNED INCOME (E.G. INTEREST OR DIVIDENDS EARNED, STOCK SALE PROCEEDS) GREATER THAN \$950 MAY NEED TO FILE A RETURN.**

**NOTE: DEPENDENTS WITH UNEARNED INCOME GREATER THAN \$1,900 ARE SUBJECT TO THEIR PARENT'S TAX RATE. COORDINATION OF RETURNS BETWEEN PARENT AND CHILD IS VERY IMPORTANT.**

**2. PLEASE COMPLETE CHILDCARE EXPENSES SECTION ONLY IF BOTH TAXPAYER & SPOUSE ARE WORKING.**

**BANK ACCOUNT DETAILS**

<b>BANK DETAILS FOR DIRECT DEPOSIT OF REFUND AMOUNT/AUTO WITHDRAWAL OF OWE AMOUNT(OPTIONAL)</b>	
<b>BANK NAME</b>	Wells Fargo
<b>BANK ROUTING NUMBER (PAPER OR ELECTRONIC)</b>	Routing number is 021200025
<b>BANK ACCOUNT NUMBER</b>	3194837930
<b>CHECKING / SAVING ACCOUNT</b>	Savings account
<b>ACCOUNT HOLDER NAME</b>	Vikram Selvamani

**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)
2019	NJ	11/15/15	PRESENTLY RESIDING STILL	2019	NJ	11/15/15	PRESENTLY RESIDING STILL
2018				2018			
2017				2017			

**Medical Expenses:**

Prescription medications	Health insurance premiums	Doctors, Dentists, etc.	Hospitals, clinics, etc.	Eyeglasses and contact lenses	Maternity expenses, if any
\$500	\$11500	\$150	\$200	\$150	

**Taxes Paid:**

Real estate taxes	State and local Personal property taxes	Other taxes, If any	Additional State taxes paid while filing last year taxes (TY2019).

**Home Mortgage Interest**

<b>Home mortgage interest paid in US - *FORM 1098Mandatory</b>	<b>Points, if any</b>	<b>Home mortgage interest paid in INDIA – *Below details required</b>	<b>Mortgage insurance premiums paid, if any</b>	<b>Investment interest. Attach Form 4952</b>
		<b>Bank Name (Foreign)</b>	<b>Bank Address (Foreign)</b>	

Note: Are you planning to purchase any House Property In Tax Year 2020 In United States Of America

Please Mention Yes Or No

Yes

No

### CHARITY CONTRIBUTIONS

S.no	Charitable Institution Name	Donated Amount	Property Donated	FMV of Property Donated	No. of trips driven and one way distance
1					
2					
3	-				

**Note: 1) Cash Contribution more than \$ 250 receipts are Mandatory**

**2) Non - Cash Contribution more than \$ 500 receipts are Mandatory**

### Vehicle Information

	Name of the Vehicle	Make & Model	Total miles driven in year 2019	One-way distance from Home to Office	Parking and toll	Purchase date
Taxpayer	TOYOTA	2014 Camry	2500	7 miles	\$150	Jan 2014
Taxpayer						
Spouse						



# GLOBAL TAX

## Business Assets Or Environment Saving Assets purchased:

Name of the Asset Purchased in 2019	Cost	Purchase date	Receipt Available or not

## 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 Form 1099-HC.	

## INVESTMENTS – SALE & PURCHASE OF STOCKS

Purchase Date	Description of Stock	Qty	Rate per Unit	Total =Qty*Rate	Sale Date	Description of the Stock	Qty	Rate per Unit	Total= Qty*Rate

Note: If you have more than 10 transactions, Please send us the sale and purchase details in an Excel sheet with the columns listed above.

## Foreign Income and Expenses (IF Any)

Particulars	Salary income	Rental Income	Interest Income	Others (If any)
a) Amount of Foreign Income				
b) Foreign Taxes Withheld (like Form-16/16A)				

<b>Other Deductions – Adjustments to Income</b>		
<b>Particulars</b>	<b>Taxpayer</b>	<b>Spouse</b>
<b>Educator expenses – only for Teaching profession (\$ 250)</b>		
<b>Health savings account Contribution</b>		
<b>Penalty on early withdrawal of saving</b>		
<b>Contribution towards Traditional IRA for 2019</b>		
<b>Student loan interest deduction – Provide Form 1098 E</b>		
<b>Tuition &amp; Fees Provide Form 1098-T</b>		
<b>Gambling Losses</b>		

**FOR FBAR/FATCA**

	<b>Tax Payer(No)</b>	<b>Spouse (No)</b>
<b>Did you have more than \$10,000 in your Foreign Accounts at any time during the Tax Year 2019</b>		
<b>Did you have more than \$50,000 in your Foreign Accounts at any time during the Tax Year 2019</b>		

Note: You may have to FBAR (Foreign Bank Account Report) before April 15, 2020 if the aggregate of your Bank Accounts/Securities Accounts/Other Financial Accounts exceeded \$10,000 at any time during the tax year 2019. You may have to file FATCA (Foreign Account tax Compliance Act) before April 15, 2020 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 2019.

**UPLOAD /EMAIL THE FOLLOWING DOCUMENTS ALONG WITH THE THIS TAX ORGANISER**



# GLOBAL TAX

Duly Filled TY-2019 Tax Organizer	
<b>W-2's:</b> Wages/salaries from All employers – Upload Documents	Yes - documents uploaded in website
<b>1099-INT &amp;1099-DIV:</b> Interest & Dividends for All Accounts	
<b>1099-B:</b> Sales of Securities, Mutual Funds, etc.	
<b>Year-End:</b> Investment statements, Mutual Fund supplemental information	
<b>1099-R:</b> Income from Pension, IRAs and Annuities	
<b>1099-G:</b> Unemployment Compensation/state income tax refund	
<b>K-1:</b> Partnerships,Trusts,Estates and S-Corporations	
<b>Last Paystubs</b> of the year from ALL Employers	
<b>1099-SSA/ 1099-RRB:</b> Social Security and Railroad Retirement benefits	
<b>Scholarships, Fellowships and Grants Form 1042 S</b>	
<b>Foreign Tax certificate ( if you made any income from foreign country during 2019)</b>	
<b>Disability and Sick Pay</b>	
<b>Gambling Winnings Form W-2G – Income from Gambling</b>	
<b>Prizes and Awards</b>	
<b>Rental Income (if any) INDIA or USA</b>	
<b>Alimony Received (if any)</b>	
<b>Home Mortgage Statement (India) (From 01st Jan To 31st Dec)</b>	
<b>Education Loan Interest Certificate (India) (From 01<sup>st</sup> Jan To 31<sup>st</sup> Dec)</b>	
<b>Form-1099HC-(Details Required From Tax Payer who is residing in MA)</b>	
<b>For New ITIN Or Renewal ITIN (Passport and VISA First and Last page is required)</b>	





# GLOBAL TAX

Refer a friend(s) to get Referral Bonus@ \$ 10 for Each paid client to us.\*\*

S. No	Friend(s) Name	Friends E-mail ID	Contact Number
1			
2			
3			
4			
5			
6			

**Feel Free to reach us at (212)-920-4151, (305)-359-3078**  
**(Monday to Saturday 9:00 AM to 8:00 PM EST)**

## Tax Preparation Fee for TY2019

**Filing Status:** Single | MFJ | MFS | HOH | QWDC

Particulars	Fee(\$)
Federal – Standard Return (Form 1040)	\$ 19.99
Each State Tax Return	\$ 34.99
Federal – Non Resident Tax Return (Form 1040NR)	\$ 59.99
Federal – ITIN Case (Paper filing)- Form 1040	\$ 89.99
Federal – Non Resident Spouse Election (Paper Filing) (6013G & H)	\$ 119.99
Federal – Schedule C, E & 1099 Misc	\$ 119.99
FBAR Processing	\$29.99
For State Rental Credit Planning/OSTC Credit Planning	\$19.99
City Return (KY, MI, NY, OH, PA) / County Return	\$ 19.99 each city
Stock Transaction	\$ 10 Per Page
FATCA Processing - Form 1040	\$29.99
Tax Representation (Unlimited (Up to 8 Succeeding Years)	*Free*



# GLOBAL TAX

Optimized Tax Planning Charges (Includes All Services of Value \$300)	\$150
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- In case of any audit taxpayer need to furnish the documents as per IRS guidelines to substantiate the claim made on the tax return.
- Claim only those expenses that you have incurred while working at client location and which is necessary expenditure to work at client locations, not lavish by nature but should be supported by proper documentary evidence.

Thank you for completing this form and Pls. upload or email your w2 and other income related statements to prepare your taxes accurately.

Looking for your Business & Support!

Warm Regards,

Global Taxes LLC. (Global Taxes team)

Phone: (212)-920-4151,(305)-359-3078

Email:[support@gtaxfile.com](mailto:support@gtaxfile.com), [info@gtaxfile.com](mailto:info@gtaxfile.com).