GLOBAL TAXES LLC

CLIENT TAX NOTES – TY 2017

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 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 TY 2017.

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)	Pradeep				
Middle Name (per SSN/ITIN)					
Last Name (per SSN/ITIN)	Kumar Ramanukolanu				
SSN/ITIN Number	178251383				

Write to us at: contact@gtaxfile.com or call us at (212)-920-4151, (305)-359-3078

GLOBAL TAXES LLC

Date of Birth (MM/DD/YY)	07-10-1990				
Relationship with Primary Taxpayer					
Occupation	Software engineer				
Current Address	2601 Satyr Hl, Columbus OH- 43219				
Cell Number	203-556-3408				
Alternative Number (Home)					
Work Number (with Extension)					
Email address	rpkumar480@gmail.com				
First port of entry Date (MM/DD/YY)	1-19-2013				
Visa status on 31st Dec 2017	H1B				
Any change in visa status during the year 2017 (if yes pls. specify)	No				
Marital status as on Dec 31,2017	single				
Date of Marriage (if applicable)					
Filing Status (Single/Married/Head of Household)	single				
No.of months stayed in US	11 months				

GLOBAL TAXES LLC

during 2017					
Will you stay in US for more than 183 days in year 2018 – (Yes or No)	Yes				
If any other information					

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 -

Dependent Name	Name of the Organization	Address with Phone Number	Federal ID Number (EIN / SSN) of the Organization / Person who provided the care.	Amount Paid

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 Child Care Expenses section only if Both Taxpayer & Spouse are working.

BANK ACCOUNT DETAILS

Bank Details for Direct Deposit of Refund Amount/Auto withdrawal of owe amount(Optional)	
Bank Name	DCU
Bank Routing Number	211391825

GLOBAL TAX

GLOBAL TAXES LLC

(Paper or Electronic)	
Bank Account Number	40662546
Checking / Saving Account	Checking
Account Holder Name	Pradeep Kumar Ramanukolanu

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)
2017	Ohio	01-01-2017	31-12-2017	2017			
2016	Ohio	08-20-2016	31-12-2016	2016			
2015				2015			

Employment Details						
	Employer Name & Address (State & City)	Designation	Employment Start Date (MM/DD/YY)	Employment End Date (MM/DD/YY)	Visa Status	Worked at Employer Location (EL) or Client Location (CL)
Taxpayer	Fast Switch Ltd.		08-22-2016	09-29-2017	H1B	CL

Write to us at: contact@gtaxfile.com or call us at (212)-920-4151, (305)-359-3078

GLOBAL TAXES LLC

Taxpayer						
Spouse						
Spouse						

If you/your spouse worked/are working at Client Location, Please fill this table:

	Taxpayer Project 1	Project 2	Project 3	**Spouse** Project 1	Project 2
Client Name	Nationwide insurance				
Client Project Location (City & State)	Columbus, OHIO				
Project Start date (MM/DD/YY)	08-22-2016				
Project End date/ expected date (MM/DD/YY)	02-28-2018				
Mode of commuting (Bus, train, rental or own car, others)	Car				
Monthly Bus, Train, Cab Fare, Car Rent if leased vehicle is used	300$				
Daily Project Miles on Vehicle (one way) using own car	20				
Monthly Rent / Stay Expenses	800$				

Daily Meals Expenses while on Client Projects	10$				
One way distance between your employer location & client location	20miles				
One way distance between your Home location & client location	20miles				

Note: Project start date and End date should be as per your deputation letter/Transfer memorandum/Email correspondence given by your employer while deputing you on the specific project.

MOVING EXPENSES

(Eligible expenditure: Airfare+Tranfortation charges+ Onward meals and tips temporary lodging and Boarding to the extent not reimbursed by your Employer)

Description of the relocation	Distance	Expenditure
a)Have you moved from Employer location to Client Location during the TY-2017		
b)Have you moved from one client location to another Client location during the TY-2017		
c)Have you moved from one Employer to another Employer Location during the TY-2017		

ITEMIZED DEDUCTIONS – Schedule A

Medical Expenses:

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

Taxes Paid:

Real estate taxes	State and local Personal property taxes	Other taxes, If any	Additional State taxes paid while filing last year taxes (TY2017).

Home Mortgage Interest

GLOBAL TAX

GLOBAL TAXES LLC

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

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 2017	One-way distance from Home to Office	Parking and toll	Purchase date
Taxpayer	Car	ford Mustang	13000	20	1200	10/26/2015
Taxpayer	car	ford mustang	5000	20	300	10/22/2017
Spouse						

Business Assets purchased:

Name of the Asset Purchased in 2017	Cost	Purchase date	Receipt Available or not
Laptop	1200		yes
Cell Phone	589		yes

GLOBAL TAX

GLOBAL TAXES LLC

Other Miscellaneous Unreimbursed Job related Expenses (Client Location)					
Particulars	**Taxpayer**	**Spouse**	**Particulars**	**Taxpayer**	**Spouse**
Union and Professional Dues			Last Year Tax Preparation Fees paid	80$	
Internet Charges per month	82$		Job Hunting Expenses		
Cell Phone Charges per month	80$		Safe Deposit Box Rental		
Employment Visa Processing Fees			Cost of Energy Saving Equipment		
Professional Books and Supplies and Magazines			Casualty or theft loss(es)		
Uniforms expenses			Parking and Toll Fees	100$	
Job Training or Higher Education Expenses			Any other expenses (Pls.give the description)		

Note: As per the IRS publication 463, All unreimbursed job related expenses can be claimed only on Temporary Client project assignment, which is generally expected to last for 12 Months or Less. And If you have received Per diem allowance from your employer, then you are not, eligible or supposed to claim the above expenses.

HEALTH INSURANCE:

Are you and your dependents covered under Health Coverage as per Federal laws??? Mandatory	**YES/NO** 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 From 1099-HC.	

GLOBAL TAX

GLOBAL TAXES LLC

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)**				

Other Deductions – Adjustments to Income

Particulars	Taxpayer	Spouse
Educator expenses – only for Teaching profession ($ 250)		
Health savings account Contribution		
Penalty on early withdrawal of saving		
Contribution towards Traditional IRA for 2017		
Student loan interest deduction – Provide Form 1098 E		
Tuition & Fees Provide Form 1098-T		
Gambling Losses		

FOR FBAR/FATCA

Did you have more than $10,000 in your Foreign Accounts at any time during the Tax Year 2017	Tax Payer(Yes/No) yes	Spouse (Yes/No)
Did you have more than $50,000 in your Foreign Accounts at any time during the Tax Year 2017		

GLOBAL TAXES LLC

Note: You may have to FBAR (Foreign Bank Account Report) before April 17, 2017 if the aggregate of your Bank Accounts/Securities Accounts/Other Financial Accounts exceeded $10,000 at any time during the tax year 2017.You may have to file FATCA (Foreign Account tax Compliance Act) before April 17, 2017 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 2017.

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

Duly Filled TY-2017 Tax Organizer	
W-2's: Wages/salaries from ALL employers – Upload Documents	
1099-INT & 1099-DIV: Interest & Dividends for All Accounts	
1099-B: Sales of Securities, Mutual Funds, etc.	
Year-End: Investment statements, Mutual Fund supplemental information	
1099-R: Income from Pension, IRAs and Annuities	
1099-G: Unemployment Compensation/state income tax refund	
K-1: Partnerships, Trusts, Estates and S-Corporations	
Last Paystubs of the year from ALL Employers	
1099-SSA / 1099-RRB: Social Security and Railroad Retirement benefits	
Scholarships, Fellowships and Grants Form 1042 S	
Foreign Tax certificate (if you made any income from foreign country during 2017)	
Disability and Sick Pay	
Gambling Winnings **Form W-2G – Income from Gambling**	
Prizes and Awards	
Rental Income (if any) INDIA or USA	
Alimony Received (if any)	
Others	

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			

Write to us at: contact@gtaxfile.com or call us at (212)-920-4151, (305)-359-3078

GLOBAL TAXES LLC

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 TY2017	
Filing Status: Single |MFJ |MFS |HOH | QWDC	
Particulars	Federal
Federal – Standard Return (Form 1040)	$ 19.99
Each State Tax Return	$ 29.99
Federal – Non Resident Tax Return (Form 1040NR)	$ 49.99
Federal – Itemized Return (Schedule A)	$ 89.99
Federal – ITIN Case (Paper filing)- Form 1040	$ 89.99
Federal – Non Resident Spouse Election (Paper Filing) (6013G & H)	$ 99.99
Federal – Schedule C, E & 1099 Misc	$ 119.98
FBAR Processing (Up To Two Bank Accounts-Free)	$5 For Each Additional Bank Account
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	Page 1 Free, Page 2 is $ 10 each

GLOBAL TAX

GLOBAL TAXES LLC

FATCA Processing - Form 1040	Free
Tax Representation	Unlimited (Up to 8 Succeeding Years)

- **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, info@gtaxfile.com
