



CLIENT TAX NOTES – TY2018

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 TY2018.

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)	AJAY BHARATH REDDY				
Middle Name (per SSN/ITIN)	-				
Last Name (per SSN/ITIN)	NAVILLA				
SSN/ITIN Number	813 40 73 67				
Date of Birth (MM/DD/YY)	08/17/93				
Relationship with Primary Taxpayer	-				
Occupation	Software Developer				
Current Address	1804 Cimarron Pkwy Atlanta, GA 30350				
Cell Number	313-818-8754				
Alternative Number (Home)	-				
Work Number (with Extension)	-				
Email address	ajayreddy8173@outlook.com				
First port of entry Date (MM/DD/YY)	08/20/15				
Visa status on 31 st Dec 2018	F1				
Any change in visa status during the year 2018 (if yes pls. specify)	NO				
Marital status as on Dec 31, 2018	unmarried.				
Date of Marriage (if applicable)	-				



GLOBAL TAX

Filing Status (Single/Married/Head of Household)	Single				
No. of months stayed in US during 2018	10 1/2 months				
Will you stay in US for more than 183 days in year 2019 - (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 Childcare 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	Bank of America
Bank Routing Number (Paper or Electronic)	121 000358
Bank Account Number	32505584 2163
Checking / Saving Account	Checking
Account Holder Name	Ajay Bharath Reddy Vavilla.

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



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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)
2018	Georgia	(01/01/18)	(12/31/18)	2018			
2017	Georgia Illinois Missouri	(12/01/17) (5/01/17) (01/01/17)	(12/31/17) (11/30/17) (4/30/17)	2017			
2016	New Hampshire	(01/01/16)	(12/31/16)	2016			

Medical Expenses:

Prescription medications	Health insurance premiums	Doctors, Dentists, etc.	Hospitals, clinics, etc.	Eyeglasses and contact lenses	Maternity expenses, if any
200 \$	280 \$/month.	650 \$	350 \$	75 \$	

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).
		3000 \$ Car purchase tax.	

Home Mortgage Interest

Home mortgage interest paid in US - *FORM 1098Mandatory	Points, if any	Home mortgage interest paid in INDIA - *Below details required	Mortgage insurance premiums paid, if any	Investment interest. Attach Form 4952
		3 locks → 4500 \$ Mortgage/Interest		
		Bank Name (Foreign)	Bank Address (Foreign)	
		State Bank of India.		

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



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HEALTH INSURANCE:

Are you and your dependents covered under Health Coverage as per Federal laws??? Mandatory	
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.	

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 2018		
Student loan interest deduction – Provide Form 1098 E		
Tuition & Fees Provide Form 1098-T		
Gambling Losses	5509	



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FOR FBAR/FATCA

	Tax Payer(No)	Spouse (No)
Did you have more than \$10,000 in your Foreign Accounts at any time during the Tax Year 2018	NO	
Did you have more than \$50,000 in your Foreign Accounts at any time during the Tax Year 2018	NO	

Note: You may have to FBAR (Foreign Bank Account Report) before April 15, 2019 if the aggregate of your Bank Accounts/Securities Accounts/Other Financial Accounts exceeded \$10,000 at any time during the tax year 2018. You may have to file FATCA (Foreign Account tax Compliance Act) before April 15, 2019 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 2018.

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

Duly Filled TY-2018 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 2018)	
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)	
Home Mortgage Statement (India) (From 01st Jan To 31st Dec)	
Education Loan Interest Certificate (India) (From 01 st Jan To 31 st Dec)	
Form-1099HC-(Details Required From Tax Payer who is residing in MA)	
For New ITIN Or Renewal ITIN (Passport and VISA First and Last page is required)	

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