

beginning , 2017, and ending , 20

Please print or type

Your first name and initial: SACHIN
Last name: PANJALA
Identifying number (see instructions): 757-98-9446
Present home address (number, street, and apt. no., or rural route): 762 Blue Sage Dr
City, town or post office, state, and ZIP code: SUNNYVALE CA 94086

Filing Status

1 Single resident of Canada or Mexico or single U.S. national
2 Other single nonresident alien
3 Married resident of Canada or Mexico or married U.S. national
4 Married resident of South Korea
5 Other married nonresident alien
6 Qualifying widow(er) (see instructions)

Check only one box.

(i) Spouse's first name and initial
(ii) Spouse's last name
(iii) Spouse's identifying number

Exemptions

7a Yourself. If someone can claim you as a dependent, do not check box 7a
7b Spouse. Check box 7b only if you checked box 3 or 4 above and your spouse did not have any U.S. gross income
c Dependents: (see instructions)
d Total number of exemptions claimed: 1

If more than four dependents, see instructions.

Income Effectively Connected With U.S. Trade/Business

8 Wages, salaries, tips, etc. Attach Form(s) W-2: 30,000
9a Taxable interest
9b Tax-exempt interest. Do not include on line 9a
10a Ordinary dividends
10b Qualified dividends (see instructions)
11 Taxable refunds, credits, or offsets of state and local income taxes
12 Scholarship and fellowship grants
13 Business income or (loss)
14 Capital gain or (loss)
15 Other gains or (losses)
16a IRA distributions
16b Taxable amount
17a Pensions and annuities
17b Taxable amount
18 Rental real estate, royalties, partnerships, trusts, etc.
19 Farm income or (loss)
20 Unemployment compensation
21 Other income
22 Total income exempt by a treaty
23 Combine the amounts in the far right column for lines 8 through 21. This is your total effectively connected income: 30,000

Attach Form(s) W-2, 1042-S, SSA-1042S, RRB-1042S, and 8288-A here. Also attach Form(s) 1099-R if tax was withheld.

Adjusted Gross Income

24 Educator expenses
25 Health savings account deduction
26 Moving expenses: 2,000
27 Deductible part of self-employment tax
28 Self-employed SEP, SIMPLE, and qualified plans
29 Self-employed health insurance deduction
30 Penalty on early withdrawal of savings
31 Scholarship and fellowship grants excluded
32 IRA deduction
33 Student loan interest deduction
34 Domestic production activities deduction
35 Add lines 24 through 34: 2,000
36 Subtract line 35 from line 23. This is your adjusted gross income: 28,000

Tax and Credits	37	Amount from line 36 (adjusted gross income)	37	28,000.
	38	Itemized deductions from page 3, Schedule A, line 15 Std Dedn US/India Treaty	38	6,350.
	39	Subtract line 38 from line 37	39	21,650.
	40	Exemptions (see instructions)	40	4,050.
	41	Taxable income. Subtract line 40 from line 39. If line 40 is more than line 39, enter -0-	41	17,600.
	42	Tax (see inst.). Check if any is from Form(s): a <input type="checkbox"/> 8814 b <input type="checkbox"/> 4972	42	2,178.
	43	Alternative minimum tax (see instructions). Attach Form 6251	43	
	44	Excess advance premium tax credit repayment. Attach Form 8962	44	
	45	Add lines 42, 43, and 44	45	2,178.
	46	Foreign tax credit. Attach Form 1116 if required	46	
	47	Credit for child and dependent care expenses. Attach Form 2441	47	
	48	Retirement savings contributions credit. Attach Form 8880	48	
	49	Child tax credit. Attach Schedule 8812, if required	49	
	50	Residential energy credit. Attach Form 5695	50	
	51	Other credits from Form: a <input type="checkbox"/> 3800 b <input type="checkbox"/> 8801 c <input type="checkbox"/>	51	
52	Add lines 46 through 51. These are your total credits	52		
53	Subtract line 52 from line 45. If line 52 is more than line 45, enter -0-	53	2,178.	

Other Taxes	54	Tax on income not effectively connected with a U.S. trade or business from page 4, Schedule NEC, line 15	54	
	55	Self-employment tax. Attach Schedule SE (Form 1040)	55	
	56	Unreported social security and Medicare tax from Form: a <input type="checkbox"/> 4137 b <input type="checkbox"/> 8919	56	
	57	Additional tax on IRAs, other qualified retirement plans, etc. Attach Form 5329 if required	57	
	58	Transportation tax (see instructions)	58	
	59a	Household employment taxes from Schedule H (Form 1040)	59a	
	59b	b First-time homebuyer credit repayment. Attach Form 5405 if required	59b	
	60	Taxes from: a <input type="checkbox"/> Form 8959 b <input type="checkbox"/> Instructions; enter code(s)	60	
61	Add lines 53 through 60. This is your total tax	61	2,178.	

Payments	62	Federal income tax withheld from:		
	a	Form(s) W-2 and 1099	62a	5,082.
	b	Form(s) 8805	62b	
	c	Form(s) 8288-A	62c	
	d	Form(s) 1042-S	62d	
	63	2017 estimated tax payments and amount applied from 2016 return	63	
	64	Additional child tax credit. Attach Schedule 8812	64	
	65	Net premium tax credit. Attach Form 8962	65	
	66	Amount paid with request for extension to file (see instructions)	66	
	67	Excess social security and tier 1 RRTA tax withheld (see instructions)	67	
	68	Credit for federal tax paid on fuels. Attach Form 4136	68	
	69	Credits from Form: a <input type="checkbox"/> 2439 b <input checked="" type="checkbox"/> Reserved c <input type="checkbox"/> 8885 d <input type="checkbox"/>	69	
70	Credit for amount paid with Form 1040-C	70		
71	Add lines 62a through 70. These are your total payments	71	5,082.	

Refund Direct deposit? See instructions.	72	If line 71 is more than line 61, subtract line 61 from line 71. This is the amount you overpaid	72	2,904.															
	73a	Amount of line 72 you want refunded to you. If Form 8888 is attached, check here <input type="checkbox"/>	73a	2,904.															
	b	Routing number <table border="1"> <tr><td>1</td><td>1</td><td>1</td><td>0</td><td>0</td><td>0</td><td>0</td><td>2</td><td>5</td></tr> </table> c Type: <input checked="" type="checkbox"/> Checking <input type="checkbox"/> Savings	1	1	1	0	0	0	0	2	5								
1	1	1	0	0	0	0	2	5											
d	Account number <table border="1"> <tr><td>4</td><td>8</td><td>8</td><td>0</td><td>6</td><td>1</td><td>5</td><td>0</td><td>9</td><td>3</td><td>2</td><td>4</td><td></td><td></td><td></td><td></td></tr> </table>	4	8	8	0	6	1	5	0	9	3	2	4						
4	8	8	0	6	1	5	0	9	3	2	4								
e	If you want your refund check mailed to an address outside the United States not shown on page 1, enter it here.																		
74	Amount of line 72 you want applied to your 2018 estimated tax	74																	

Amount You Owe	75	Amount you owe. Subtract line 71 from line 61. For details on how to pay, see instructions	75	
	76	Estimated tax penalty (see instructions)	76	

Third Party Designee	Do you want to allow another person to discuss this return with the IRS? See instructions <input type="checkbox"/> Yes. Complete below. <input checked="" type="checkbox"/> No		
	Designee's name	Phone no.	Personal identification number (PIN)

Sign Here Keep a copy of this return for your records.	Under penalties of perjury, I declare that I have examined this return and accompanying schedules and statements, and to the best of my knowledge and belief, they are true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.													
	Your signature	Date	Your occupation in the United States	If the IRS sent you an Identity Protection PIN, enter it here (see instr.)										
			SOFTWARE ENGINEER	<table border="1"> <tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr> </table>										

Paid Preparer Use Only	Print/Type preparer's name	Preparer's signature	Date	Check <input type="checkbox"/> if self-employed	PTIN
	APPANA RUPA VENKATA SATYA SAI MANI KUMAR	APPANA RUPA VENKATA SATYA SAI MANI KUMAR	06/11/2018		P02090332
	Firm's name	Firm's EIN		Phone no.	
	GLOBAL TAXES LLC	30-1017196		(678)965-9729	
	Firm's address				
	2530 Pebble Creek Ln Cumming GA 30041				

Schedule A—Itemized Deductions (see instructions)

07

Taxes You Paid	1	State and local income taxes		1
Gifts to U.S. Charities		Caution: If you made a gift and received a benefit in return, see instructions.		
	2	Gifts by cash or check. If you made any gift of \$250 or more, see instructions	2	
	3	Other than by cash or check. If you made any gift of \$250 or more, see instructions. You must attach Form 8283 if the amount of your deduction is over \$500	3	
	4	Carryover from prior year	4	
	5	Add lines 2 through 4		5
Casualty and Theft Losses	6	Casualty or theft loss(es). Attach Form 4684. See instructions		6
Job Expenses and Certain Miscellaneous Deductions	7	Unreimbursed employee expenses—job travel, union dues, job education, etc. You must attach Form 2106 or Form 2106-EZ if required. See instructions ▶ -----	7	
	8	Tax preparation fees	8	
	9	Other expenses. See instructions for expenses to deduct here. List type and amount ▶ ----- ----- -----	9	
	10	Add lines 7 through 9	10	
	11	Enter the amount from Form 1040NR, line 37	11	
	12	Multiply line 11 by 2% (0.02)	12	
	13	Subtract line 12 from line 10. If line 12 is more than line 10, enter -0-		13
Other Miscellaneous Deductions	14	Other—see instructions for expenses to deduct here. List type and amount ▶ ----- ----- ----- ----- -----		14
Total Itemized Deductions	15	Is Form 1040NR, line 37, over the amount shown below for the filing status box you checked on page 1 of Form 1040NR: <ul style="list-style-type: none"> • \$313,800 if you checked box 6; • \$261,500 if you checked box 1 or 2; or • \$156,900 if you checked box 3, 4, or 5? <input type="checkbox"/> No. Your deduction is not limited. Add the amounts in the far right column for lines 1 through 14. Also enter this amount on Form 1040NR, line 38. <input type="checkbox"/> Yes. Your deduction may be limited. See the Itemized Deductions Worksheet in the instructions to figure the amount to enter here and on Form 1040NR, line 38.		15

Schedule OI—Other Information (see instructions)

Answer all questions

- A** Of what country or countries were you a citizen or national during the tax year? INDIA
- B** In what country did you claim residence for tax purposes during the tax year? India
- C** Have you ever applied to be a green card holder (lawful permanent resident) of the United States? Yes No
- D** Were you ever:
1. A U.S. citizen? Yes No
2. A green card holder (lawful permanent resident) of the United States? Yes No
- If you answer "Yes" to (1) or (2), see Pub. 519, chapter 4, for expatriation rules that apply to you.
- E** If you had a visa on the last day of the tax year, enter your visa type. If you did not have a visa, enter your U.S. immigration status on the last day of the tax year. F1
- F** Have you ever changed your visa type (nonimmigrant status) or U.S. immigration status? Yes No
If you answered "Yes," indicate the date and nature of the change. ► _____
- G** List all dates you entered and left the United States during 2017. See instructions.
Note: If you are a resident of Canada or Mexico AND commute to work in the United States at frequent intervals, **check the box for Canada or Mexico** and skip to item H Canada Mexico

Date entered United States mm/dd/yy	Date departed United States mm/dd/yy

Date entered United States mm/dd/yy	Date departed United States mm/dd/yy

- H** Give number of days (including vacation, nonworkdays, and partial days) you were present in the United States during:
2015 _____, 2016 366, and 2017 344.
- I** Did you file a U.S. income tax return for any prior year? Yes No
If "Yes," give the latest year and form number you filed . . . ► 2016 1040NR
- J** Are you filing a return for a trust? Yes No
If "Yes," did the trust have a U.S. or foreign owner under the grantor trust rules, make a distribution or loan to a U.S. person, or receive a contribution from a U.S. person? Yes No
- K** Did you receive total compensation of \$250,000 or more during the tax year? Yes No
If "Yes," did you use an alternative method to determine the source of this compensation? Yes No
- L** Income Exempt from Tax—If you are claiming exemption from income tax under a U.S. income tax treaty with a foreign country, complete (1) through (3) below. See Pub. 901 for more information on tax treaties.
1. Enter the name of the country, the applicable tax treaty article, the number of months in prior years you claimed the treaty benefit, and the amount of exempt income in the columns below. Attach Form 8833 if required. See instructions.

(a) Country	(b) Tax treaty article	(c) Number of months claimed in prior tax years	(d) Amount of exempt income in current tax year

- (e) Total.** Enter this amount on Form 1040NR, line 22. Do not enter it on line 8 or line 12
2. Were you subject to tax in a foreign country on any of the income shown in 1(d) above? Yes No
3. Are you claiming treaty benefits pursuant to a Competent Authority determination? Yes No
If "Yes," attach a copy of the Competent Authority determination letter to your return.

Moving Expenses

Department of the Treasury
Internal Revenue Service (99)

▶ Go to www.irs.gov/Form3903 for the latest information.
▶ Attach to Form 1040 or Form 1040NR.

2017

Attachment
Sequence No. **170**

Name(s) shown on return

SACHIN PANJALA

Your social security number

757-98-9446

Before you begin:

- ✓ See the **Distance Test** and **Time Test** in the instructions to find out if you can deduct your moving expenses.
- ✓ See **Members of the Armed Forces** in the instructions, if applicable.

<p>1 Transportation and storage of household goods and personal effects (see instructions)</p>	1	1,500.
<p>2 Travel (including lodging) from your old home to your new home (see instructions). Do not include the cost of meals</p>	2	500.
<p>3 Add lines 1 and 2</p>	3	2,000.
<p>4 Enter the total amount your employer paid you for the expenses listed on lines 1 and 2 that is not included in box 1 of your Form W-2 (wages). This amount should be shown in box 12 of your Form W-2 with code P</p>	4	
<p>5 Is line 3 more than line 4?</p> <p><input type="checkbox"/> No. You cannot deduct your moving expenses. If line 3 is less than line 4, subtract line 3 from line 4 and include the result on Form 1040, line 7, or Form 1040NR, line 8.</p> <p><input checked="" type="checkbox"/> Yes. Subtract line 4 from line 3. Enter the result here and on Form 1040, line 26, or Form 1040NR, line 26. This is your moving expense deduction</p>	5	2,000.

Nonresident Alien Information Worksheet

2017

Keep for your records

QuickZoom to Form 1040NR
QuickZoom to Client Status

Part I - Personal Information

Last name PANJALA Middle initial
First name SACHIN Suffix
Social security number 757-98-9446 Occupation (in the U.S.) SOFTWARE ENGINEER
Date of birth (mm/dd/yyyy) 04/05/1993 or age as of 1-1-2018 24
Work phone Home phone
Extension E-mail address SACHINPANJALA@GMAIL.COM
Cell phone (469) 657-8154 Foreign phone
Fax number

Country of which client was a citizen or national during year INDIA
Check this box if your client is a resident of the Republic of Korea (ROK)

Best contact phone number Taxpayer cell phone (469) 657-8154

Present home address:

US Address:

Address 762 Blue Sage Dr Apt no.
City SUNNYVALE State CA U.S. ZIP code 94086

Foreign Address: Check this box to use foreign address

Address Apt no.
City
Country code Country
Province/country Postal Code

Address outside the United States to which any refund check should be mailed, if different from the present home address above.

Address
City Province
Country code Postal Code

If filing Form 8840 or Form 8843 by itself, give address in the country where client is a permanent resident. If same as present home address, write 'Same'.

Part II - Federal Filing Status

Check the box for filing status:

- 1 Single resident of Canada or Mexico, or a single U.S. national
2 Other single nonresident alien
3 Married resident of Canada or Mexico, or a married U.S. national
4 Married resident of the Republic of Korea
5 Other married nonresident alien
6 Qualifying widow(er) with dependent child

If filing status is married:

...check this box to take an exemption for the client's spouse (only if spouse had no U.S. gross income)
spouse's SSN

...check this box if client did not live with spouse at any time during the year

Check the appropriate box for the year the spouse died 2015 2016

If the 'qualifying person' is your child but not your dependent:

Child's First name MI Last Name Suff

Child's social security number

Check this box if client is eligible for benefits of Article 21(2) of U.S. - India Income Tax Treaty

► Keep for your records

Name(s) Shown on Return
SACHIN PANJALA

Social Security Number
757-98-9446

Form W-2 Employer	SP	Wages	Federal Tax	State Wages	State Tax
SP TECHNOLOGIES INC		30,000.	5,082.	30,000.	1,441.
Totals		30,000.	5,082.	30,000.	1,441.

Form W-2 Summary

Box No.	Description	Taxpayer	Spouse	Total
1	Total wages, tips and compensation:			
	Non-statutory & statutory wages not on Sch C . . .	30,000.		30,000.
	Statutory wages reported on Schedule C			
	Foreign wages included in total wages.			
	Unreported tips.	0.		0.
2	Total federal tax withheld	5,082.		5,082.
3 & 7	Total social security wages/tips			
4	Total social security tax withheld			
5	Total Medicare wages and tips			
6	Total Medicare tax withheld			
8	Total allocated tips			
9	Not used			
10 a	Total dependent care benefits			
b	Offsite dependent care benefits			
c	Onsite dependent care benefits			
11	Total distributions from nonqualified plans . . .			
12 a	Total from Box 12			
b	Elective deferrals to qualified plans			
c	Roth contrib. to 401(k), 403(b), 457(b) plans. .			
d	Deferrals to government 457 plans			
e	Deferrals to non-government 457 plans			
f	Deferrals 409A nonqual deferred comp plan. .			
g	Income 409A nonqual deferred comp plan. . .			
h	Uncollected Medicare tax			
i	Uncollected social security and RRTA tier 1 . .			
j	Uncollected RRTA tier 2			
k	Income from nonstatutory stock options			
l	Non-taxable combat pay			
m	QSEHRA benefits			
n	Total other items from box 12			
14 a	Total deductible mandatory state tax	270.		270.
b	Total deductible charitable contributions			
c	Total deductible employee expenses			
d	Total RR Compensation			
e	Total RR Tier 1 tax			
f	Total RR Tier 2 tax			
g	Total RR Medicare tax			
h	Total RR Additional Medicare tax			
i	Total RRTA tips.			
j	Total other items from box 14			
16	Total state wages and tips	30,000.		30,000.
17	Total state tax withheld	1,441.		1,441.
19	Total local tax withheld.			

► Keep for your records

SACHIN PANJALA

757-98-9446 Page 2

Form W-2G Payer	SP	Winnings	Federal Tax	State Tax	Local Tax
Totals					

Form W-2G Summary

Box No.	Description	Taxpayer	Spouse	Total
1	Total reportable winnings			
4	Total federal tax withheld			
15	Total state tax withheld			
17	Total local tax withheld			

► Keep for your records

Name as shown on return SACHIN PANJALA	Social Security Number 757-98-9446
---	---------------------------------------

Employer EIN 37-1795098
 Employer Name SP TECHNOLOGIES INC
 Name (cont.) _____
 Street Address or P. O. Box 2209 BLENDED TREE RANCH DRIVE
 City LEANDER State TX ZIP 78641
 Foreign Province/County _____
 Foreign Postal Code _____
 Foreign Country _____

Spouse's W-2 Do not transfer this W-2 to next year
 Automatically calculate lines 3 through 6 and line 16.

Caution: Box 12 entries for deferred compensation will change lines 3 through 6 automatically.

1 Wages, tips, other comp 30,000. 2 Federal tax withheld 5,082.
 3 Social security wages _____ 4 Social sec tax withheld _____
 5 Medicare wages and tips _____ 6 Medicare tax withheld _____
 7 Social security tips _____ 8 Allocated tips _____
 13 b Retirement plan
 Active duty military pay

Box 12 Code	Box 12 Amount	If Box 12 code is:
_____	_____	A: Enter amount attributable to RRTA Tier 2 tax . . . _____
_____	_____	M: Enter amount attributable to RRTA Tier 2 tax . . . _____
_____	_____	P: Double click to link to Form 3903, line 4 _____
_____	_____	R: Enter MSA contribution for Taxpayer _____
_____	_____	Spouse _____
_____	_____	W: Enter HSA contribution for Taxpayer _____
_____	_____	Spouse _____
_____	_____	G: <input type="checkbox"/> Employer is not a state or local government

Box 15 State	Employer's state I.D. no.	Box 16 State wages, tips, etc.	Box 17 State income tax
CA	071-2973-7	30,000.	1,441.
_____	_____	_____	_____
_____	_____	_____	_____

I confirm that the state withholding identification number(s) are accurate

Box 20 Locality name	Box 18 Local wages, tips, etc.	Box 19 Local income tax	Associated State
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

9 Verification Code _____ 9 _____
 10 Dependent care benefits (Check if employer furnished care at work) . . . ► 10 _____
 Dependent care benefits - Amount forfeited from flexible spending account . . . _____
 11 Distributions from Section 457 and other nonqualified plans (See help, if EIC, Child Care, Child Tax Credit, or IRAs.) 11 _____

Box 14 Description or Code on Actual Form W-2	Amount	ProSeries Identification of Description or Code (Identify this item by selecting the identification from the drop down list. If not on the list, select Other).
CA SDI	270.	California SDI tax
_____	_____	_____
_____	_____	_____

Keep for your records

SACHIN PANJALA

757-98-9446 Page 2

Employer Name SP TECHNOLOGIES INC

Part I Statutory employees

A [] Box 13a. Statutory employee
B [] Deducting expenses in connection with this income
C [] If deducting expenses, double click to link to Schedule C C

Part II Clergy, church employees, members of recognized religious sects

Clergy only:
D [] Designated housing or parsonage allowance D
E [] Smallest of (a) the designated housing or parsonage allowance, (b) amount spent on qualifying housing expenses, or (c) fair rental value E
F If no FICA was withheld, check the applicable box below
1 [] Pay self-employment tax on housing or parsonage allowance only
2 [] Pay self-employment tax on W-2 income only
3 [] Pay self-employment tax on W-2 income and housing allowance
4 [] Exempt from self-employment tax and has approved Form 4361
Non-Clergy only:
G If no FICA was withheld, check the applicable box below
1 [] Pay self-employment tax on this W-2 income
2 [] Exempt from self-employment tax and has approved Form 4029

Part III Unreported Tip Income

H 1 [] Tips \$20 or more in a month which were not reported to employer H1
2 [] Tips less than \$20 in a month which were not required to be reported H2
3 [] Value of non-cash tips, such as tickets or passes, not reported H3
4 [] Actual amount of allocated tips if different than the amount in box 8 H4
5 [] Tips paid out through a tip-sharing arrangement H5
6 [] Employer is a federal, state, or local government and tips are only subject to Medicare tax

Part IV Substitute Form W-2

a If substitute Form W-2 needed, double-click to link this W-2 to a Form 4852
b Enter Form 4852, Line 9 information. "How did you determine amounts on line 7 of Form 4852?"
c Form 4852, Line 10 information. "Explain your efforts to obtain Form W-2?"
d QuickZoom to completed Form 4852 for reference

Part V Inmate In a Penal Institution

J a Pay from work performed while an inmate in a penal institution []

Part VI Additional Information for Electronic Filing and Certain States (See Help)

13 c [] Third-party sick pay
[] Non-standard W-2 (handwritten, typewritten, or altered in any way)
[] Corrected W-2
[] Income from Paid Family Leave
Control number (optional)

Employee information: Correct to match employee information on W-2

Employee's SSN. 757-98-9446
First name M.I. Last name Suff.
SACHIN PANJALA
Address City St ZIP code
762 Blue Sage Dr SUNNYVALE CA 94086
Foreign Province/County Foreign Postal Code
Foreign Country

Federal Carryover Worksheet

2017

▶ Keep for your records

Name(s) Shown on Return SACHIN PANJALA	Social Security Number 757-98-9446
---	---------------------------------------

2016 State and Local Income Tax Information

(a) State or Local ID	(b) Paid With Extension	(c) Estimates Pd After 12/31	(d) Total With- held/Pmts	(e) Paid With Return	(f) Total Over- payment	(g) Applied Amount
Totals . .						

2016 State Extension Information

(a) State	(b) Paid With Extension

2016 Locality Extension Information

(a) Locality	(b) Paid With Extension

2016 State Estimates Information

(a) State	(c) Estimates Paid After 12/31

2016 Locality Estimates Information

(a) Locality	(c) Estimates Paid After 12/31

2016 State Taxes Due Information

(a) State	(e) Paid With Return

2016 Locality Taxes Due Information

(a) Locality	(e) Paid With Return

2016 State Refund Applied Information

(a) State	(g) Applied Amount

2016 Locality Refund Applied Information

(a) Locality	(g) Applied Amount

2016 State Tax Refund Information

(a) State	(d) Total Withheld/Pmts	(f) Total Overpayment

2016 Locality Tax Refund Information

(a) Locality	(d) Total Withheld/Pmts	(f) Total Overpayment

Other Tax and Income Information		2016	2017
1	Filing status		1 Single
2	Number of exemptions for blind or over 65 (0 - 4)		
3	Itemized deductions		1,711.
4	Check box if required to itemize deductions	<input type="checkbox"/>	<input type="checkbox"/>
5	Adjusted gross income		28,000.
6	Tax liability for Form 2210 or Form 2210-F		
7	Alternative minimum tax		0.
8	Federal overpayment applied to next year estimated tax		

QuickZoom to the IRA Information Worksheet for IRA information ►

Excess Contributions		2016	2017
9 a	Taxpayer's excess Archer MSA contributions as of 12/31		
b	Spouse's excess Archer MSA contributions as of 12/31		
10 a	Taxpayer's excess Coverdell ESA contributions as of 12/31		
b	Spouse's excess Coverdell ESA contributions as of 12/31		
11 a	Taxpayer's excess HSA contributions as of 12/31		
b	Spouse's excess HSA contributions as of 12/31		

Loss and Expense Carryovers		2016	2017
Note: Enter all entries as a positive amount			
12 a	Short-term capital loss		
b	AMT Short-term capital loss		
13 a	Long-term capital loss		
b	AMT Long-term capital loss		
14 a	Net operating loss available to carry forward		
b	AMT Net operating loss available to carry forward		
15 a	Investment interest expense disallowed		
b	AMT Investment interest expense disallowed		
16	Nonrecaptured net Section 1231 losses from:	a	2017
		b	2016
		c	2015
		d	2014
		e	2013
		f	2012
17	AMT Nonrecap'd net Sec 1231 losses from:	a	2017
		b	2016
		c	2015
		d	2014
		e	2013
		f	2012

SACHIN PANJALA

757-98-9446

Credit Carryovers			2016	2017
18	General business credit		18	
19	Adoption credit from:	a 2017	19 a	
		b 2016	b	
		c 2015	c	
		d 2014	d	
		e 2013	e	
		f 2012	f	
20	Mortgage interest credit from:	a 2017	20 a	
		b 2016	b	
		c 2015	c	
		d 2014	d	
21	Credit for prior year minimum tax		21	
22	District of Columbia first-time homebuyer credit		22	
23	Residential energy efficient property credit		23	

Other Carryovers			2016	2017
24	Section 179 expense deduction disallowed		24	
25	Excess deduction:	a Taxpayer (Form 2555, line 46)	25 a	
		b Taxpayer (Form 2555, line 48)	b	
		c Spouse (Form 2555, line 46)	c	
		d Spouse (Form 2555, line 48)	d	

Charitable Contribution Carryovers

26	2016 Carryover of charitable contributions from:	Other Property		Capital Gain	
		(a) 50%	(b) 30%	(c) 30%	(d) 20%
a	2016				
b	2015				
c	2014				
d	2013				
e	2012				

27	2017 Carryover of charitable contributions from:	Other Property		Capital Gain	
		(a) 50%	(b) 30%	(c) 30%	(d) 20%
a	2017				
b	2016				
c	2015				
d	2014				
e	2013				

Smart Worksheets from your 2017 Federal Tax Return

SMART WORKSHEET FOR: U.S. Nonresident Alien Income Tax Return (Copy 1)

Students/Business Apprentices from India Smart Worksheet	
Use this worksheet if your client is a student or business apprentice from India who is eligible for the benefits of Article 21(2) of the United States – India Income Tax Treaty.	
A	Standard deduction allowed under United States – India Income Tax Treaty . . . <u>6,350.</u>
B	Net Qualified Disaster Loss _____
C	Standard deduction claimed with Qualified Disaster Loss <u>6,350.</u>
Note: If your client is married and the spouse itemizes deductions on a separate return do not enter an amount on line A above.	

SMART WORKSHEET FOR: U.S. Nonresident Alien Income Tax Return (Copy 1)

Tax Smart Worksheet	
A	Tax <u>2,178.</u>
Check if from:	
1	Tax Table <input checked="" type="checkbox"/>
2	Tax Computation Worksheet (see instructions) <input type="checkbox"/>
3	Schedule D Tax Worksheet <input type="checkbox"/>
4	Qualified Dividends and Capital Gain Tax Worksheet <input type="checkbox"/>
5	Schedule J <input type="checkbox"/>
6	Form 8615 <input type="checkbox"/>
B	Additional tax from Form 8814 _____
C	Additional tax from Form 4972 _____
D	Tax from additional Form(s) 4972 _____
E	IRC Section 197(f)(9)(B)(ii) election for an additional tax _____
F	Health Coverage Tax Credit Recovery, Form 8885, Line 5 Negative Amount _____
G	Tax. Add lines A through F. Enter the result here and on line 42 <u>2,178.</u>

SMART WORKSHEET FOR: Form 3903 : Moving Expenses

General Information Smart Worksheet

A Enter the new principal place of work for this move . . . _____

B Total reimbursements entered on Form W-2 with an amount in Box 12 and code P that are linked to this form _____

C Other allowance or reimbursements not on Form W-2 _____

D Enter the number of miles from your **old home** to your **new workplace** 400 miles

E Enter the number of miles from your **old home** to your **old workplace** 40 miles

F Subtract line E from line D. If zero or less, enter -0- 360 miles

Is line F at least 50 miles?

Yes ▶ You meet this test.

No ▶ You do not meet this test. You **cannot** deduct your moving expenses.
Do Not complete Form 3903.

G For **foreign** moves check here **only if all** the following apply ▶

- You moved in an earlier year
- You are claiming **only** storage fees while you are **away** from the United States
Enter storage fees applicable to foreign move _____
- Any amount your employer paid for storage fees is included as wages in box 1 of Form W-2

SMART WORKSHEET FOR: Form 3903 : Moving Expenses

Travel Expenses Smart Worksheet

Enter your travel expenses:

A Travel and lodging expenses for this move (excluding auto expenses) 500.

B Parking fees and tolls _____

C Gasoline and oil _____

D Miles driven traveling to new home _____