



## 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)	VENKAT RAJEEV REDDY				
MIDDLE NAME (PER SSN/ITIN)					
LAST NAME (PER SSN/ITIN)	MALIPEDDI				
SSN/ITIN NUMBER	690-11-8751				
DATE OF BIRTH (MM/DD/YY)	07-19-92				
RELATIONSHIP WITH PRIMARY TAXPAYER	SELF				
OCCUPATION	SOFTWARE ENGINEER				
CURRENT ADDRESS	1445 Bell Trace Dr Antioch TN 37013				
CELL NUMBER	937-979-7829				
ALTERNATIVE NUMBER (HOME)					
WORK NUMBER (WITH EXTENSION)					
EMAIL ADDRESS	venkatrajeevreddy@gmail.com				
FIRST PORT OF ENTRY DATE (MM/DD/YY)	First: Aug 03 2015 Recent: May 06 2019				
VISA STATUS ON 31 <sup>ST</sup> DEC 2019	F1 Student				
ANY CHANGE IN VISA STATUS DURING THE YEAR 2019 (IF YES)	No				



# GLOBAL TAX

PLS. SPECIFY)					
MARITAL STATUS AS ON DEC 31,2019	single				
DATE OF MARRIAGE (IF APPLICABLE)					
FILING STATUS (SINGLE/MARRIED/HEAD OF HOUSEHOLD)					
NO. OF MONTHS STAYED IN US DURING 2019					
WILL YOU STAY IN US FOR MORE THAN 183 DAYS IN YEAR 2020 – (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

<b>BANK DETAILS FOR DIRECT DEPOSIT OF REFUND AMOUNT/AUTO WITHDRAWAL OF OWE AMOUNT(OPTIONAL)</b>	
BANK NAME	Coastal Aspiration
BANK ROUTING NUMBER (PAPER OR ELECTRONIC)	125108997
BANK ACCOUNT NUMBER	223104030851
CHECKING / SAVING ACCOUNT	Checking
ACCOUNT HOLDER NAME	Venkat Rajeev Malipeddi



### 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	AR TN	01/01/2019 11/21/2019	11/20/2019 12/31/2019	2019			
2018	AR	01/01/2018	12/31/2018	2018			
2017	OH, NC	01/27/2017 08/11/2017	08/10/2017 12/31/2017	2017			

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			

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).