

# 2024 Individual Tax Organizer

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Abhishek Kashyp

## Individual Tax Organizer 2 / 2

Welcome! We're so excited to work with you.

This organizer is "smart" - this means that questions will populate based on the information you give us. For example, if you indicate you are married, we'll ask about your spouse. If you're not - we won't! 😊

- Your answers will auto-save! You don't have to worry about losing data; you can return anytime.
- You will save time next year once you provide us with the information. You can also pre-fill your answers in the future.
- You can complete this on your computer or mobile phone. The mobile app allows you to use the scanner to create high-quality PDFs!
  - [Click to download app on Google Play store](#)
  - [Click to download app on Apple App Store](#)

**Once you are done, please click 'submit'. When you submit, this will indicate to our team you are finished!**

**This organizer autosaves after you answer each question, and you may return to complete it later if you do not have all the necessary information.**

**You can use Android or iOS Mobile Apps to scan your documents and upload them to the portal quickly.**

**\*\*\* Please post your valuable review on Google <https://g.page/r/CUBIAINuFUXZEAE/review> to redeem a \$15 credit for your next tax services. \*\*\***

\*Please confirm the calendar year you are completing this organizer for

2024 (Jan 1 -Dec 31 2024)

\*Is this your FIRST year filing taxes with us? Or Is your filing status changed?

No

**Family Information - Existing Client 1/4**

Personal Details (If Any Changes) - Please provide all family members First Name, Last Name, Middle Initial, SSN and Date of Birth details (Multi-line Text Entry)

**New family member - Amaya G Kashyap, SSN 504-51-0386, Jan 26 2024**

**Additional Information 7 / 15**

Any of your dependent stayed outside the US for more than 6 months in the Tax year?

**No**

Health Insurance - Do all of the members in your house have health insurance?

**Yes**

**Helpful Info** - If you contributed the money through your employer, I can collect it from your W2. In this situation, I need only the distribution (amount you used through HSA account) amount details.

CRYPTO - Did you BUY or SELL any Crypto currencies in the last year?

**No**

FBAR- Do you have a requirement to file FBAR?

**No**

**FBAR Requirement -**

A United States person, including a citizen, resident, corporation, partnership, limited liability company, trust, and estate, must file an FBAR to report:

- a financial interest in or signature or other authority over at least one financial account located outside the United States if
- the aggregate value of those foreign financial accounts exceeded \$10,000 at any time during the calendar year reported.

more details.

FATCA - Do you have a requirement to file FATCA?

**No**

**FATCA Requirement -**

You must file Form 8938 if you must file an income tax return and:

- You are unmarried and the total value of your specified foreign financial assets is more than \$50,000 on the last day of the tax year or more than \$75,000 at any time during the tax year
- You are married filing a joint income tax return and the total value of your specified foreign financial assets is more than \$100,000 on the last day of the tax year or more than \$150,000 at any time during the tax year.
- You are married filing separate income tax returns and the total value of your specified foreign financial assets is more than \$50,000 on the last day of the tax year or more than \$75,000 at any time during the tax year. For purposes of calculating the value of your specified foreign financial assets in applying this threshold, include one-half the value of any specified foreign financial asset jointly owned with your spouse. However, report the entire value on Form 8938 if you are required to file Form 8938.

[more details.](#)

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### Helpful Info - I need the following details.

- State that issued the ID or license
- State ID or license number
- Date issued
- Expiration date

Any Relocation during the tax year?	<b>No</b>
Please select all forms that apply for you	<ul style="list-style-type: none"> <li>● Stocks/Cryptocurrency</li> <li>● Own a home</li> <li>● Hybrid Car Purchase &amp; Solar Installation</li> <li>● Day Care Expenses</li> <li>● New Family Member Added</li> <li>● Rental Properties</li> </ul>

### Income Source 1 / 2

Select all that are applicable	<ul style="list-style-type: none"> <li>● W2s from all Employers</li> <li>● 1099 (INT &amp; DIV)</li> <li>● Any Other Income</li> </ul>
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### Stocks & Crypto 1 / 3

Select All that are applicable	<ul style="list-style-type: none"> <li>● 1099-B from all brokerage accounts</li> </ul>
Own a home 1 / 3	<ul style="list-style-type: none"> <li>● Mortgage Interest - Form 1098 Documents from all Lenders (If you refinance don't forget the old and new 1098)</li> <li>● Property Tax (or) Payment Confirmation screenshot</li> <li>● DMV Registration</li> <li>● Cash/Non-Cash Donation Receipts</li> </ul>

### Hybrid Car Purchase / Solar Installation 1 / 2

#### Helpful Info -

- Additional Information on Tax Credits for Energy Star Home Appliances
- IRS updates frequently asked questions related to new, previously-owned and qualified commercial clean vehicle credits
- Credits for new clean vehicles purchased in 2023 or after

Select all that are applicable	<ul style="list-style-type: none"> <li>● Solar Installation Receipts</li> </ul>
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**Note** - If the you have received credit from the car dealer, please upload the documentation.

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### New Family member added 1 1/2

Select all that are applicable

- SSN Card**
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