

# 2024 Individual Tax Organizer 16 / 16

Prashanth Venkatesan

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## Individual Tax Organizer 2 / 2

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👋 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. \*\*\***

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\*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**

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**Additional Information** 9 / 15

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Any of your dependent stayed outside the US for more than 6 months in theTaxyear? **No**

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

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**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.

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Was all of the money you withdrew from the HSA account used to pay for or reimburse yourself for out of pocket medical expenses? **Yes**

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CRYPTO - Did you BUY or SELL any Crypto currencies in the last year? **No**

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FBAR- Do you have a requirement to file FBAR? **No**

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**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.](#)

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FATCA - Do you have a requirement to file FATCA? **No**

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**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.](#)

Helpful Info - I need the following details.

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

Upload ID documents here.

Driving license - Prashanth.pdf  
Driving license - Anitha.pdf

Any Relocation during the tax year?

No

Please select all forms that apply for you

- Own a home
- Rental Properties

Income Source 2 / 2

Select all that are applicable

- W2s from all Employers

Upload Income Source Documents that you have selected in the above list

W2 - 2024.pdf  
1098-2024 4147 home.pdf  
1098 - 2066.pdf  
W2 - 2024 Anitha.pdf  
Rental-Property-Details.xlsx

Own a home 2 / 3

Select All that Applicable

- Mortgage Interest - Form 1098 Documents from all Lenders (If you refinance don't forget the old and new 1098)
- Property Tax (or) Payment Confirmation screenshot
- Cash/Non-Cash Donation Receipts

Upload Itemized Deductions related documents

1098 - 2066 (2).pdf  
1098-2024 4147 home (2).pdf

Rental Properties 1 1 / 3

'Rental-Property-Details.xlsx' Excel sheet is available in the current tax year folder. Please fill all relevant details and upload it here.

Rental-Property-Details (2).xlsx