

## 2024 Individual Tax Organizer 27 / 27

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

Bank Details (If Any Changes) - Bank Account Information for Refund or Due payments (Bank Name, Routing Number, Account Number and Account Type) - Multi-line Text Entry

**U S Bank, Account # 157544035643, Routing # 121122676**

**Additional Information** 15 / 15

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

**No**

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

**Yes**

If you bought the insurance from outside sources (the Market Place), please upload form 1095A

**Health Insu-RSNotice1095A\_en.pdf  
8f2bcc41-e783-45cc-9461-46c9d0881cc4.pdf**

IP PIN - Please provide if you or your spouse have received Identity Protection PIN (IP PIN) from the IRS for this calendar year?

**NO**

HSA Contribution - If you have a HSA Account, please provide contribution amount here. (DO NOT include the contribution you did through work)

**NO**

HSA Distribution - Please enter Distribution Amount here.

**NO**

**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.

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

**No**

Estimated Tax Payments - Have you made any estimated tax payments to the IRS and State? Please provide date and amount details.

**no**

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

**Yes**

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.](#)

Valid ID - Please provide your and your spouse's valid state ID or Driving License details (Front/Back) **yes**

### 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. **Nive ID.pdf**

Any Relocation during the tax year? **No**

Please select all forms that apply for you **● Stocks/Cryptocurrency**

### Income Source 2 / 2

Select all that are applicable **● W2s from all Employers**  
**● 1099 (INT & DIV)**

Upload Income Source Documents that you have selected in the above list  
**W2\_2024 CHIRAN.pdf**  
**U-2\_f1099nec\_2024.pdf**  
**Covered California Proof of Coverage.pdf**  
**door-tax1099nec-2024-acct\_1Pta6aMELe5qieCn.pdf**  
**U-1\_f1099k\_2024.pdf**  
**Health Insu-RSNotice1095A\_en (2).pdf**  
**Robinhood Markets Consolidated Form 1099 (1).pdf**

### Stocks & Crypto 2 / 3

Select All that are applicable **● 1099-B from all brokerage accounts**

Crypto - Quantity, Purchase Date and Cost basis(Purchase Price), Sale Date and Proceeds (Feel free to upload an excel sheet) **Attached in 2024 doc in the your system (file name is Robinhood)**

### Any Additional Documents 4 / 5

Sales Tax - Did you make online purchases where State Sales tax wasn't collected? If YES, please enter the amount.

**No**

GIFT - Did you make or receive any gifts of more than \$17,000 to any individual last year? A gift is generally not taxable to the recipient. Share more details.

**No**

Other Tax Related Documents

● **1095 A/B/C - Proof of Medical Insurance**

Please upload any additional documents here

**Covered California Proof of Coverage (2).pdf**

## Additional Notes 1 / 2

Additional Notes #1 - Please add any additional notes that you want us to know

**Last year we filed for my new born child, so this year also we gonna file? plz let me know.**