

2024 Individual Tax Organizer

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Park, Timothy S.

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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. *****

*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

Home Address (If Any Changes)

15400 Chelsea Dr San Jose CA 95124

Additional Information 8/15

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.](#)

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.

Timothy Park Park License Front.jpg
Erica Park License Front.jpeg
Timothy Park Park License Back.jpg
Erica Park License Back.jpeg

Any Relocation during the tax year?

No

Please select all forms that apply for you

- Stocks/Cryptocurrency
- Own a home
- Day Care Expenses

Income Source 1 / 2

Select all that are applicable

- W2s from all Employers
- 1099 (INT & DIV)
- Worldwide Income & Foreign Taxes Paid
- Un-Employment Income
- Taxable offsets of state and local taxes
- Any Other Income

Stocks & Crypto 2 / 3

Select All that are applicable

- 1099-B from all brokerage accounts
 ESPP/RSUs - We need supplemental forms - Other than E-Trade
- or Fidelity OR if you don't have supplemental forms, Please share Form-3922

Upload Stocks and Crypto Documents

Timothy Park Etrade MS_2024_1099 combined.pdf
Timothy Park Etrade getSupplementalInformation.pdf
Erica Park Etrade MS_2024_1099 combined.pdf
Erica Park Etrade getSupplementalInformation.pdf
Timothy Park Chase 1099 combined.pdf

Own a home 3 / 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
- DMV Registration
- Closing Documents (First time Home Buyers)

Upload Itemized Deductions related documents

Property tax 1of4 2024-2025.pdf
Property tax 3of4 2024-2025.pdf
DMV Receipt.pdf
Property tax 4of4 2023-2024.pdf
1098-MORT MORTGAGE 2094 WellsFargo.pdf
First Time Home Buyer Closing Disclosure.pdf
Property tax 2of4 2023-2024.pdf
Erica Park Car Lease and Registration.pdf

Mortgage Interest Rate? (Only for the First time Home Buyers)

7.0

Day Care Expenses 1 4 / 4

Child Name	Adam Park
Total Daycare Expenses	21576.50
Daycare Provider Information (Name, Federal Tax ID, SSN, Address, Phone)	Bluebird Montessori Child Care 3124 Williamsburg Dr. San Jose CA 95117 EIN# 82-0927412 (408) 335-5888
Upload Daycare Expense Receipts	Adam Park April 2024.pdf Adam Park Jan. 2024.pdf Adam Park Dec. 2024.pdf Adam Park March 2024.pdf Adam Park May 2024.pdf Adam Park Feb. 2024.pdf Adam Park June 2024.pdf Adam Park Aug. 2024.pdf Adam Park Nov. 2024.pdf Adam Park Sep. 2024.pdf Adam Park Oct. 2024.pdf Adam Park July 2024.pdf

Any Additional Documents 5 / 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	<input checked="" type="radio"/> 1095 A/B/C - Proof of Medical Insurance
Do you have any Alimony Amount to report? Please enter Spouse Name, SSN and Amount (This is applicable only prior 2018 separations)	No
Please upload any additional documents here	erica park 1095c.pdf Timothy Park 1095-C Outset Medical.pdf Silver sale PO-72040.pdf Silver Purchase 1 SO-1007452 (1).pdf Erica Park NR4.pdf Silver Purchase 2 Order X507655954 (1).pdf Silver Purchase 3 Order X507660582 (1).pdf

Additional Notes 2 / 2

Additional Notes #1 - Please add any additional notes that you want us to know	I have a \$20,429.50 capital loss from a sale of silver bullion. Receipts are attached.
Additional Notes #2 - Please add any additional notes that you want us to know	Erica withdrew the balance of her registered pension plan from her previous employer's Canadian employer. This transaction is detailed in the attached NR4. \$9,037.29 CAD was withheld in taxes by the Canada Revenue Agency.