

2024 Individual Tax Organizer

22 / 22

Anil Gadamshetty

Individual Tax Organizer 3 / 3

 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 come back any time.
- Once you provide us with the information once, it will save you time next year! You will be able to pre-fill your answers in the future, saving you time!
- You can complete this on your computer or mobile phone. If using the mobile app, you can use the scanner to take 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 every question you answer, and you may return to complete it later if you do not have all of the information needed.

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/CeCEiBEzrfbZEAvg/review> to redeem a \$15 credit for your next tax services. *****

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

Other

Which Year?	2024
*Is this your FIRST year filing taxes with us? Or Is your filing status changed?	Yes

Family Information - New Client 7 / 7

*Select your filing status	Married Filing Jointly
----------------------------	-------------------------------

Helpful Info - What is My Filing Status?

*Personal Details - Please provide all family members First Name, Last Name, Middle Initial, SSN and Date of Birth details (Multi-line Text Entry)	1) First Name : Anil Chandra Last Name: Gadamshetty SSN:665-31-2268 Date of Birth : 02/04/1969 2) First Name : Madhavi Last Name: Gadamshetty SSN:123-51-2578 Date of Birth : 10/04/1973 3)First Name : Aayush Last Name: Gadamshetty ITIN : 947-98-7117 Date of Birth : 06/28/2006
*Phone/Email - Please enter your Phone Number, Email Address and Occupation (Multi-line text entry)	9789089277 anilchandrag@hotmail.com Employed - Sr. Project Manager
*Home Address	9201 Harrisburg Lane, Mc kinney, Texas.75071
*Bank Details - Bank Account Information for Refund or Due payments (Bank Name, Routing Number, Account Number and Account Type) - Multi-line Text Entry	Bank Of America Account number: 004647921807 Routing number: 011000138
Is this your FIRST YEAR filing taxes in the United States (USA)?	No
*Previous Year's Tax returns	2022TaxReturn.PDF 2023TaxReturn.PDF 2021TaxReturn.PDF

Additional Information 8 / 14

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

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
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

Any Relocation during the tax year?

No

Please select all forms that apply for you

Own a home

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
1098T(2024).pdf**

Own a home 2 / 2

Select All that Applicable

- Mortgage Interest - Form 1098 Documents from all Lenders (If you refinance don't forget the old and new 1098)
- DMV Registration

Upload Itemized Deductions related documents

RenewalReceipt.pdf
Property1098-2024.pdf
1098T(2024) (2).pdf