

# 2024 Individual Tax Organizer 28 / 28

Yaminiteja Thotapalli

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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)**

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\*Is this your FIRST year filing taxes with us? Or Is your filing status changed? **No**

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**Additional Information** 8 / 15

Any of your dependent stayed outside the US for more than 6 months in theTaxyear?	<b>No</b>
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Health Insurance - Do all of the members in your house have health insurance?	<b>Yes</b>
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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.

CRYPTO - Did you BUY or SELL any Crypto currencies in the last year?	<b>Yes</b>
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FBAR- Do you have a requirement to file FBAR?	<b>No</b>
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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.](#)

FATCA - Do you have a requirement to file FATCA?	<b>No</b>
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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.](#)

Valid ID - Please provide your and your spouse's valid state ID or Driving License details (Front/Back)	<b>Driving License details (Front/Back)</b>
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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?

**No**

Please select all forms that apply for you

- **Stocks/Cryptocurrency**
- **Own a home**
- **Day Care Expenses**
- **Rental Properties**
- **Education Related Expenses**
- **Schedule C (Independent Contractor or Solo Proprietor)**

**Income Source** 1 / 2

Select all that are applicable

- **W2s from all Employers**
- **1099 (INT & DIV)**
- **Taxable offsets of state and local taxes**

**Stocks & Crypto** 1 / 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**

**Own a home** 1 / 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**
- **Cash/Non-Cash Donation Receipts**

**Day Care Expenses 1** 3 / 4

Child Name

**Niv Thotapalli**

Total Daycare Expenses

**8475**

Daycare Provider Information (Name, Federal Tax ID, SSN, Address, Phone)

**Little Scholars Nest Preschool, 7003 Emerson Ln, San Ramon, CA 94582, (925)-858-7605****Rental Properties 1** 2 / 3

Rental Income

**\$ 19,559.00**

Rental Expenses

**\$ 33,199.00****Schedule-C - General Information (Independent Contractor or Solo Proprietor)** 6 / 7

Business Name

**Netrie LLC**

Business Address	<b>8157 Briar Oaks Drive, San Ramon, CA 94582</b>
What is the main activity of this business?	<b>Software Consulting Services</b>
What is the EIN?	<b>92-2083208</b>
Who owns the business?	<b>Taxpayer</b>
Business structure	<b>Sole Proprietor OR Single Member LLC</b>

**Schedule-C - Income (Independent Contractor or Solo Proprietor)** 1 / 3

Gross receipts or sales (Form 1099-MISC, box 7)	<b>15395</b>
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**Schedule-C - Expenses (Independent Contractor or Solo Proprietor) 1** 3 / 43

Is your office based out of your home?	<b>Yes</b>
Total area of the house (sq feet)	<b>2774</b>
Area of business portion	<b>130</b>