

## 2024 Individual Tax Organizer 2 / 2

Vijay Golamari

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### Individual Tax Organizer 2 / 3

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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

Other

\*Is this your FIRST year filing taxes with us? Or Is your filing status changed?

Yes

**Family Information - New Client** 0 / 6**Helpful Info - What is My Filing Status?****Additional Information** 0 / 15

**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.

**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 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
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