

# 2024 Individual Tax Organizer 82 / 82

BHARATH RAM MANOHARAN

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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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**Additional Information** 9 / 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>No</b>
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FBAR- Do you have a requirement to file FBAR?	<b>Yes</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>Drivers License</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

Upload ID documents here.

Bharath new drivers license.pdf  
Kiruthika-Drivers-License.pdf

Any Relocation during the tax year?

No

Please select all forms that apply for you

- Stocks/Cryptocurrency
- Own a home
- Hybrid Car Purchase & Solar Installation
- Rental Properties
- FBAR/FATCA
- Education Related Expenses
- Schedule C (Independent Contractor or Solo Proprietor)

**Income Source** 2 / 2

Select all that are applicable

- W2s from all Employers
- 1099 (INT & DIV)
- Worldwide Income & Foreign Taxes Paid

Upload Income Source Documents that you have selected in the above list

Kiruthika-w2-university-of-California-2024.pdf  
Bharath-BOA-1099-INT-TaxStatement\_2024.pdf  
Bharath-W2-Salesforce-2024.pdf  
Kiruthika-Thimble-Form\_W-2\_Tax\_Year\_2024.pdf  
1099-INT-Treasury-2024-Both.pdf  
intcert\_Bharath\_01-Jan-24\_31-Dec-24.pdf  
merrill-1099-INT-2024-Bharath.pdf  
intcert\_Kiruthika\_01-Jan-24\_31-Dec-24.pdf  
2024-taxdocuments-Kiruthika-Chase-1099-INT.pdf

**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

Bharath-Etrade-Supplement-For-Form-1099-B (2).pdf  
Bharath-Vanguard-1099-2024 (2).pdf  
Bharath-Etrade-MS\_2024\_1099-CONS\_MSSB\_LLC\_0437\_20250204 (2).pdf  
Bharath-Morgan- Stanley-Form-3922-2024.pdf

**Own a home** 2 / 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

Upload Itemized Deductions related documents

rental-property-1098-2024.pdf  
INV\_ORD1717606519990624045956.pdf  
1098-5081-carducci-dr-2024-valon.pdf  
INV\_ORD1729184354125225937162.pdf  
5081-property-tax-payment-apr-2024.pdf  
INV\_ORD1723995577508925103246.pdf  
INV\_ORD1729184354125225937162 (1).pdf  
INV\_ORD1723995577508925103246 (1).pdf

[mazda-renewal-dmv-2024.pdf](#)  
[mrcooper-form-1098-2024.pdf](#)  
[INV\\_ORD1713376726881823345382.pdf](#)  
[INV\\_ORD1720204142900824456157.pdf](#)  
[5081-property-tax-payment-nov-2024.pdf](#)  
[mrcooper-1099-INT-2024.pdf](#)  
[indiana-rental-property-property-tax-2024.pdf](#)  
[Donation-in-india-evidence-2024.pdf](#)  
[save-the-children-donation-2024.pdf](#)  
[INV\\_ORD1717606519990624045956 \(1\).pdf](#)

## Hybrid Car Purchase / Solar Installation 2 / 2

### Helpful Info -

- [Additional Information on Tax Credits for Energy Star Home Appliances](#)
- [IRS updates frequently asked questions related to new, previously-owned and qualified commercial clean vehicle credits](#)
- [Credits for new clean vehicles purchased in 2023 or after](#)

Select all that are applicable

- **Solar Installation Receipts**
- **Energy Savings Equipment Purchase or Installations Receipts**

**Note** - If the you have received credit from the car dealer, please upload the documentation.

Upload Hybrid Car or Solar installation related Documents

**Solar plus battery Invoice for Bharath 2024.pdf**

## Rental Properties 1 3 / 3

Rental Income **22494**

Rental Expenses **12393**

'Rental-Property-Details.xlsx' Excel sheet is available in the current tax year folder. Please fill all relevant details and upload it here.

**Bharath\_2024\_Rental-Property-Details.numbers**

## FBAR / FATCA 3 / 3

Do you want me to file FBAR/FATCA?

**Yes**

Please provide the maximum balance in the year in all financial institutions in the Foreign Countries

**68095.97**

'FBAR\_FATCA\_Checklist.xlsx' Excel Sheet is available in the current tax year folder. Please fill all relevant details and upload it here.

**Kiruthika\_2024\_FBAR\_FATCA\_Checklist.numbers**  
**Bharath\_2024\_FBAR\_FATCA\_Checklist.numbers**

## Education Related Expenses 2 / 3

For 1099-T - Specify whether student is doing Graduation or Under-Graduation and which year.

**Kiruthika is doing her Ph. D. at George Mason, Virginia**

Upload Education related documents

**kiruthika-tax1098\_2024.pdf**

**Schedule-C - General Information (Independent Contractor or Solo Proprietor)** 6 / 7

Business Name	<b>Execute on Command LLC</b>
Business Address	<b>2108 N ST STE N, Sacramento, CA 95816</b>
What is the main activity of this business?	<b>IT education and training</b>
What is the EIN?	<b>99-5091632</b>
Business structure	<b>Sole Proprietor OR Single Member LLC</b>
Please upload any 1099 you have received for this business	<b>ExecuteoncommandLLC_initial-report_california.pdf ExecuteoncommandLLC_ein_federal.pdf 9-23-24 - CA - Formation Document - Execute on command LLC (1).pdf</b>

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

Gross receipts or sales (Form 1099-MISC, box 7)	<b>0</b>
Returns and allowances	<b>0</b>
Other income	<b>0</b>

**Schedule-C - COST OF GOODS SOLD (Independent Contractor or Solo Proprietor)** 7 / 7

Inventory at beginning of the year	<b>0</b>
Purchases	<b>199</b>
Cost of items for personal use	<b>0</b>
Cost of labor	<b>0</b>
Materials and supplies	<b>25</b>
Other cost of goods sold:	<b>0</b>
Inventory at end of the year	<b>0</b>

**Schedule-C - Expenses (Independent Contractor or Solo Proprietor) 1** 35 / 41

Car expenses in this year	<b>0</b>
Is your office based out of your home?	<b>No</b>
Accounting	<b>0</b>
Advertising	<b>0</b>
Bank charges	<b>0</b>
Business Licenses	<b>229</b>
Dues and subscriptions	<b>0</b>
Employee benefit programs	<b>0</b>
Insurance (other than health)	<b>0</b>
Mortgage interest (reported on 1098)	<b>0</b>
Other interest	<b>0</b>

Janitorial	0
Laundry and cleaning	0
Legal and professional	0
Miscellaneous	0
Office expense	0
Outside services	0
Parking and tolls	0
Postage	0
Printing	0
Rent - other	0
Rent - buildings	0
Repairs	0
Security	0
Supplies	0
Taxes - real estate	0
Taxes - payroll	0
Taxes - sales tax in gross receipts	0
Taxes - other	0
Telephone	265
Tools	0
Travel	0
Meals and entertainment in full	867
Wages	0
Other Expenses:	0

### Any Additional Documents 2 / 5

Other Tax Related Documents	● 1095 A/B/C - Proof of Medical Insurance
Please upload any additional documents here	Bharath-1095c-2024.pdf 1095-C-Kiruthika-2024.pdf

### Additional Notes 2 / 2

Additional Notes #1 - Please add any additional notes that you want us to know	I forgot to mention that I received an inheritance in 2023 (12.5 lakhs). It's deposit in an ICICI fixed deposit account which is recorded in the FBAR spreadsheet. Let me know if you need to know anymore details on that.
Additional Notes #2 - Please add any additional notes that you want us to know	Please note the following deductions - Save the children & Ketto donations (receipts uploaded) - DMV vehicle registration renewal (receipts uploaded) - Various donations to charity in India (738.16 USD) I started contributing to 529 account. I haven't taken any money out of this. Just wanted to let you know. My wife is doing her Ph.D. She paid tuition fee for it. Please let me know if it can be

**deducted. As for my new LLC company, as mentioned via sms, it didn't make any money. It incurred a few expenses which I mentioned on appropriate pages. Please call me to discuss. I can provide more clarity. Thanks**

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