

2023 Individual Tax Organizer 25 / 25

Manavalan, Sadheesh Kumar

Individual Tax Organizer 2 / 2

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

*Please confirm the calendar year you are completing this organizer for **2023 (Jan 1 -Dec 31 2023)**

*Is this your FIRST year filing taxes with us? Or Is your filing status changed?	Yes
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Family Information - New Client 6 / 7

*Select your filing status	Married Filing Jointly
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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)	Wife First Name : Sudha, Last Name : Sadheeshkumar, DOB: 16-Mar-1980, SSN :817-37-5822 Daughter First Name : Priyadharshni , Last Name : Sadheeshkumar , DOB : 09-Sep-2008 , ITIN :(949-98-4041) Son First Name : Hirishhikesh Last Name : Sadheeshkumar , DOB : 14-Dec-2011, ITIN : (949-98-4086)
*Phone/Email - Please enter your Phone Number, Email Address and Occupation (Multi-line text entry)	Mobile : 7023010180 , email Address : m_sadheesh@yahoo.com, Occupation : Software Engg India Mobile Number : +91-8015786864
*Home Address	US Address : 36147 San Pedro Dr, Fremont, CA 94536 India Address : 4-180 Kotha Street, Melaiyur & Post, Sirkali Taluk, Tamil Nadu, PIN : 609107, India
*Bank Details - Bank Account Information for Refund or Due payments (Bank Name, Routing Number, Account Number and Account Type) - Multi-line Text Entry	Bank name : Bank of america, Account Number : 501011028596, Rounting Number : 122400724
Is this your FIRST YEAR filing taxes in the United States (USA)?	No

Additional Information 9 / 17

Any of your dependent stayed outside the US for more than 6 months in theTaxyear?	Yes
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?	Yes

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.](#)

Valid ID - Please provide your and your spouse's valid state ID or Driving License details (Front/Back) **NA**

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? **Yes**

List all Dates, To/From State/Country **Moved from USA to India Apr 1st 2023**

Please select all forms that apply for you

- **Stocks/Cryptocurrency**
- **Own a home**
- **Property Sale**
- **FBAR/FATCA**

Income Source 2 / 2

Select all that are applicable

- **W2s from all Employers**
- **1099 (INT & DIV)**

Upload Income Source Documents that you have selected in the above list **Sadheeshkumar Manavalan_W2 2023.pdf**

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 / 2

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**

Property Sale 1 2 / 5

Select all that are applicable

- **Purchase and Sale Deed documents**

Is this your PRIMARY Home?

Yes

FBAR / FATCA 1 / 3

Do you want me to file FBAR/FATCA?

Yes

Additional Notes 1 / 2

Additional Notes #1 - Please add any additional notes that you want us to know

1)My wife and 2 kids stayed in US last year till 30-Jun-2022. I hope that covered 6 month time. Please let me know if any changes needed. 2) I bought a home last year Mar-2022 and invested to upgraded the home last year but due to personal reason I sold that home last year Feb-2023. so please let me know what are the details needed. This fall into Lost category .