

2024 Individual Tax Organizer 31 / 31

Naveen kumar duggi

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 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. *****

*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? **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)

Naveen kumar duggi 663189409 07 25 1987 nagarani vemapti 487773527 03 26 1989

*Phone/Email - Please enter your Phone Number, Email Address and Occupation (Multi-line text entry)

551 208 9230 naveen.duggi@gmail.com software engineer nagarani.vempati90@gmail.com 813 453 1181 software engineer

*Home Address

1201 blanket flower dr george town texas 78628

*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 051000017 4350 2259 0231 checking

Is this your FIRST YEAR filing taxes in the United States (USA)?

No

*Previous Year's Tax returns

**TaxReturn2022.pdf
TaxReturn2023.pdf****Additional Information** 11 / 17

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

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?

Yes

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 - 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](#)

Upload ID documents here.

scan_Jun-08-2025_23-25-15.pdf
scan_Jun-08-2025_23-25-40.pdf
scan_Jun-08-2025_23-44-52.pdf
RANI DL BACK.pdf

Any Relocation during the tax year?

Yes

List all Dates, To/From State/Country

Moved from virginia on april 20th to texas in 2024

Any unreimbursed moving expenses?

20000

Please select all forms that apply for you

- Stocks/Cryptocurrency
- Own a home
- Day Care Expenses
- Property Sale
- FBAR/FATCA

Income Source 2 / 2

Select all that are applicable

- W2s from all Employers
- 1099 (INT & DIV)
- K1s (Partnerships or S-Corp)

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

Screenshot_20250608_235530_Adobe Acrobat.jpg
Chase 1098.jpg
Charles-1099 (2).pdf
Duggi-w2-visa (3).pdf
Rani 2024 W2 (2).pdf
unitedmortgage-1099 (2).pdf

hsa-1099 (2).pdf
merilllynch-1099-both (2).pdf

Stocks & Crypto 1 / 3

Select All that are applicable

- **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**
- **Cash/Non-Cash Donation Receipts**
- **Closing Documents (First time Home Buyers)**

Day Care Expenses 1 3 / 4

Child Name

Duggi nethra

Total Daycare Expenses

6000

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

The prep

Property Sale 1 2 / 5

Select all that are applicable

- **Purchase and Sale Deed documents**

Is this your PRIMARY Home?

Yes

FBAR / FATCA 2 / 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

1500000