

# 2024 Individual Tax Organizer

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Vinoth Rajasekaran

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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

**Family Information - Existing Client 4 / 4**

Personal Details (If Any Changes) - Please provide all family members First Name, Last Name, Middle Initial, SSN and Date of Birth details (Multi-line Text Entry)

**First Name : Vinoth Kumar, Last Name : Rajasekaran, SSN: 794-72-5289, DOB: 09/28/1983 First Name : Sarumathi, Last Name : Dakshinamurthi Manohar, SSN: 695-16-2761 , DOB: 07/09/1986 First Name : Riya, Last Name : Vinoth, DOB: 10/17/2013**

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

**Phone Number: 925 523 9031 Email: vinoth.ssn@gmail.com  
Occupation : Software Engineer**

Home Address (If Any Changes)

**6292 Murdock Way, San Ramon, CA 94582**

Bank Details (If Any Changes) - Bank Account Information for Refund or Due payments (Bank Name, Routing Number, Account Number and Account Type) - Multi-line Text Entry

**Bank Name: Chase Routing Number : 267084131 Account Number : 992259408 Account Type : Checking**

**Additional Information 9 / 15**

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

**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?

**No**

**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.](#)

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

Vinoth DL: F4621539 Sarumathi DL: F5570361

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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

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Any Relocation during the tax year?

No

Please select all forms that apply for you

- Stocks/Cryptocurrency
- Own a home
- IRA Contributions / Distributions
- Hybrid Car Purchase & Solar Installation
- Property Sale
- Rental Properties

### Income Source 1/2

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Select all that are applicable

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

### Stocks & Crypto 1/3

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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

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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

### IRA Contributions/Distributions 2/4

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Select all that are applicable

- Transferred money from IRA to Roth IRA Account
- IRA to Back door Roth IRA

Did you withdraw money from your IRA account? Please specify amount and reason for the withdrawal to waive the 10% penalty. **Please check the attached document for these information**

## Hybrid Car Purchase / Solar Installation 1/2

### 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.

## Property Sale 1 2/5

Select all that are applicable

- Purchase and Sale Deed documents
- Receipts for any taxes paid
- Receipts of Expenses (upgrades, commissions, repairs etc)

Is this your PRIMARY Home?

Yes

## Rental Properties 1 2/3

Rental Income

Rentals are managed by property management company, they gave a 1099-MISC form, I have attached those.

Rental Expenses

1. I am not sure how to compute property, I have attached the year end rental statement I have received from the property management company 2. Also I believe we can write off the rental property depreciation

## Additional Notes 1/2

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

Have you sold (322 GOLDFIELD PL) this property in 2024? If yes, please give me the buyer & selling documents. Yes, I am attaching 1099-S document Have you purchased (6292 MURDOCK WAY) this property in 2023? If so, please send me the buyer's documents. Yes