

2024 Individual Tax Organizer 2 / 2

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Individual Tax Organizer 2 / 3

👋 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 **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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