

Tell us about You

Client: Anusha Konchada / TaxYear: 2019-2020

Gender	Female
First name ?	Anusha
Full middle name?	No Answer
Last name?	Konchada
Country of citizenship?	India
Are you also a citizen of another country?	No
Where will you be/were you residing on 15-Apr-2020?	United States
Enter your 9-digit U.S. Social Security Number (SSN) or Individual Tax Identification Number (ITIN) here, or check the box below to indicate that you have neither. Please enter numbers only, with no dashes.?	181318586
I don't have a U.S. Social Security Number(SSN) or Individual Tax Identification Number(ITIN). <i>Please note that it is mandatory for one of the previous two items to completed.(You must either enter your SSN/ITIN or check the box to indicate that you do not have one.)</i>	No Answer
Have you received an IRS Identity protection PIN?	No
Have you ever revoked U.S. Citizenship?	No
Do you currently hold a U.S. Green Card?	No
Have you applied for a Green Card?	No
Have you ever revoked a U.S. Green Card?	No
Enter type of U.S. visa as of 31-Dec-2019	H-1B Professional in a Specialty Occupation
Enter your current visa number (usually this is an 8 digit number - located near the lower right corner of the Visa Stamp in your Passport)?	K4443731
How many days did you spend in the U.S. during the 2018 calendar year (January to December)?	348
How many days did you spend in the U.S. during the 2017 calendar year (January to December)?	346
Do you have a passport?	Yes
Passport number	J0645424
Country or territory that issued your passport	India
Date of your birth	5-Jun-1988
Do you have a driver's license or picture identification card issued by a US state?	Yes
Issuing state	Georgia (GA)
Type of ID	Driver's license
ID number as it appears on your Driver's license or State ID	061091815
Expiration date	9-May-2021
Issue date	9-Sep-2019
Occupation/profession/job title	Senior Consultant
Hiring date with current employer	21-Jun-2010
Are you still employed by this employer?	Yes
Do you authorize Deloitte to discuss your tax return with the United States tax authorities?	Yes
Did you file a U.S. income tax return for any year before 2019?	Yes
Have you ever elected to file a joint U.S. tax return when you (or your spouse) were living outside the U.S.?	No
Latest year filed U.S. return	2018
U.S. Form Number	(Choose)
Do you wish to contribute \$3 to the U.S. Presidential Election Campaign?	No
Are you blind?	No
Are you disabled?	No
Preferred e-mail address	AKONCHADA@DELOITTE.COM
Alternate e-mail address	No Answer

[Tell us about your family](#)

What was your relationship status on 31-Dec-2019?	Single									
Has your relationship status changed between 01-Jan-2019 and 31-Dec-2019?	No									
Do you have dependent children?	No									
Did you provide support and living expenses for someone other than a spouse or a child	No									
Tell us about your work location(s) during the year										
Were you on an assignment (including relocation/permanent transfer/local hire) or an extended business trip outside your home country at any time between 01-Jan-2019 and 31-Dec-2019?	Yes									
List your current and previous year assignments										
<table><tr><th></th><th>Country</th><th>U.S. State</th></tr><tr><td>1</td><td>United States</td><td>Georgia</td></tr><tr><td>2</td><td>United States</td><td>Ohio</td></tr></table>			Country	U.S. State	1	United States	Georgia	2	United States	Ohio
	Country	U.S. State								
1	United States	Georgia								
2	United States	Ohio								
Did you live in one country but regularly commute for work to another country on a weekly or daily basis at any time between 01-Jan-2019 and 31-Dec-2019?	No									
Enter any additional information regarding this page here?	No Answer									
I have completed this page.	Checked									

Tell us about your Home Country

Client: Anusha Konchada / TaxYear: 2019-2020

Contact Information

Did you reside at more than one address between 01-Jan-2019 and today's date? No

Do you have any intention of moving or changing addresses in the near future? No

Home Country Residence

Telephone No Answer

Cell/ Mobile 9959060469

Country India

Street 1 Near GSI, Tattiannaram

Street 2 Bandlaguda, Nagole

Suite/Apartment B4-305, Indu Aranya Pallavi apartments

City/Town Hyderabad

State TELANGANA

Zip/ Postal Code? 500068

Using this address since 17-Mar-2012

Home Country Employer

Employer name Deloitte Consulting India Pvt. Ltd.

Country No Answer

Telephone No Answer

Cell/Mobile No Answer

In care of (C/O)? No Answer

Street 1 No Answer

Street 2 No Answer

Suite/Apartment No Answer

City/Town No Answer

Zip/Postal code? No Answer

Other

Telephone No Answer

Cell/Mobile No Answer

Country No Answer

Suite/Apartment No Answer

Street 1 No Answer

Street 2 No Answer

City/Town No Answer

Zip/Postal code? No Answer

Enter any additional information regarding this page here: No Answer

I have completed this page. Checked

Taxpayer Foreign Assignment Information (Including Relocation/Transfer) - United States

Client: Anusha Konchada / TaxYear: 2019-2020

Contact Details

Telephone	No Answer
Cell/Mobile	6232155033
Country	United States
Suite/Apartment	701
Street 1	509 Lindbergh place NE
Street 2	No Answer
City/Town	Atlanta
State	Georgia (GA)
County	No Answer
Zip/Postal code (enter N/A if does not exist)?	30324

Assignment Country business

Cell/Mobile	No Answer
Country	United States
Business name	Anthem
Telephone	No Answer
Suite/Apartment	No Answer
Street 1	600 Peachtree St NE
Street 2	No Answer
City/Town	Atlanta
State	Georgia (GA)
County	No Answer
Zip/Postal code (enter N/A if does not exist)?	30308

Start/End/Duration of Assignment Details

Employer Name	Deloitte consulting
When did your employer expect you to start your assignment?	1-Sep-2017
What is the date you physically arrived for your assignment in this host country?	18-Mar-2018
How long did you intend to stay in United States (at date of arrival in this assignment country)?	2 Years
Has your assignment ended?	Yes
Have you permanently left United States?	No
Reason you have not permanently left United States?	Other
Describe other reason for not leaving United States:	I moved onto a new Assignment that is based in Ohio
When did your assignment end?	30-Aug-2019
Enter any additional information regarding this page here:?	No Answer
I have completed this page.	Checked

Taxpayer Foreign Assignment Information (Including Relocation/Transfer) - United States

Client: Anusha Konchada / TaxYear: 2019-2020

Contact Details

Telephone	No Answer
Cell/Mobile	6232155033
Country	United States
Suite/Apartment	2D
Street 1	9272 Deercross Parkway
Street 2	No Answer
City/Town	BlueAsh
State	Ohio (OH)
County	No Answer
Zip/Postal code (enter N/A if does not exist)?	45236

Assignment Country business

Cell/Mobile	No Answer
Country	United States
Business name	Kroger
Telephone	No Answer
Suite/Apartment	No Answer
Street 1	9997 Carver Road
Street 2	No Answer
City/Town	BlueAsh
State	Ohio (OH)
County	No Answer
Zip/Postal code (enter N/A if does not exist)?	45242

Start/End/Duration of Assignment Details

Employer Name	Deloitte consulting
When did your employer expect you to start your assignment?	3-Sep-2019
What is the date you physically arrived for your assignment in this host country?	18-Mar-2018
How long did you intend to stay in United States (at date of arrival in this assignment country)?	1+ to 2 Year
Has your assignment ended?	No
Does your employer know when this assignment will end?	No
Enter any additional information regarding this page here:?	Started on this project on 3-Sept 2019 however, i physically moved to BlueAsh (OH) on 8th Dec 2019
I have completed this page.	Checked

Tell us about your Employment Income

Client: Anusha Konchada / TaxYear: 2019-2020

Wages/Salary

Did you receive or expect to receive a U.S. Form W-2? Yes Yes

List each U.S. Form W-2 received by you

	Name of employer
1	Deloitte consulting India Pvt Ltd.

Did you or your spouse receive any other employer wages/salary not reported above ? No No

Equity/Stock Compensation

Have you ever participated in any equity/stock plan? No

Other Compensation

Do you have compensation that is deferred into the future that is not part of a qualified retirement plan No

Enter any additional information regarding this page here:? No Answer

I have completed this page. Checked

U.S. wage statement - Deloitte consulting India Pvt Ltd.

Client: Anusha Konchada / TaxYear: 2019-2020

Verification code (if applicable). Do not enter dashes (-).	No Answer
Whose employer	Anusha
Employment start date	--
Has employment with this employer been terminated?	(Choose)
Employer identification number	061454513
Employer's street address	4022 Sells Drive
Employer's city	Hermitage
Employer's state	Tennessee
Employer's zip/postal code	37076-2903
Box 1: Wages, tips, other compensation	No Answer
Box 2: Federal income tax withheld	No Answer
Box 3: Social security wages	No Answer
Box 4: Social security tax withheld	No Answer
Box 5: Medicare wages and tips	No Answer
Box 6: Medicare tax withheld	No Answer
Box 7: Social security tips	No Answer
Box 8: Allocated tips	No Answer
Box 10: Dependent care benefits	No Answer
Box 11: Nonqualified plans	No Answer

Box 12: Details

	Box 12 Code	Box 12 Amount
1	DD	No Answer

Box 13: Type	(Choose)
Box 14: State disability insurance (SDI) taxes?	No Answer

Box 14: Other (non SDI) details

	Box 14: Other description	Box 14: Amount
1	CA SDI Tax	No Answer

List each state

	Box 15: State name	Employer's state ID number	State wages, tips, etc.	State tax withheld	School district code	School district tax withheld
1	Georgia (GA)	2214871HF	No Answer	No Answer	No Answer	No Answer
2	Ohio (OH)	52633534	No Answer	No Answer	No Answer	No Answer

List each locality

	Locality name	Local wages, tips, etc.	Local income tax withheld
1	No Answer	No Answer	No Answer

Enter any additional information regarding this page here:?

Georgia- Jan 2019 through Dec8th 2019 Ohio- Dec8th 2019 through Current date Please note that i was travelling 4 days a week between Atlanta (GA) and Cincinnati from Sept9th 2019 through Nov 22nd 2019. 4 days in Ohio

I have completed this page.

Checked

Tell us about your Other Income/Gains....

Client: Anusha Konchada / TaxYear: 2019-2020

Investments		
Did you receive/expect to receive any interest income on U.S. Form 1099-INT?	No	No
Did you receive/expect to receive any dividend income on U.S. Form 1099-DIV?	No	No
Did you have any transactions reported on U.S. form 1099-B?	No	No
Did you receive a foreign person's U.S. Source Income Form U.S. 1042-S?	No	No
Did you receive interest income during the year NOT already reported above ?	No	No
Did you receive dividend income during the year NOT already reported above ?	No	No
Did you sell stock shares or securities that were not already reported elsewhere in the Organizer??		No
Did you have stock shares or securities that became worthless (zero value only)?		No
Do you have any investment in any non-US mutual funds, investment trusts, pooled investment funds or similar arrangements. (This does not apply to assets held in a U.S. brokerage account)?	No	No
Did you sell any personal assets that resulted in a gain (not including stocks/shares, securities, or real estate)??		No
Did you receive any installment sale proceeds or have a sale involving future proceeds?	No	No
Pension/Retirement Distributions		
Did you receive/expect to receive a distribution reported on a U.S. Form 1099-R?	No	No
Did you convert an IRA, 401(k), etc. to a Roth IRA?	No	No
Did you receive a distribution from a Government Retirement Plan (e.g. U.S. Social Security, U.S. Railroad Retirement)?	No	No
Did you receive payments/distributions from a pension fund or retirement plan including any other country funds? not already reported above?	No	No
Rental Property , Business Ownership , Estate and Trust activities		
Did you have any real estate rental property??		No
Did you refinance or significantly pay down a mortgage denominated in a currency other than U.S. Dollars??	No	No
Did you receive/expect to receive any U.S. Schedule(s) K-1 (Form 1065 - Partnerships; Form 1120S - S Corporations; Form 1041 - Estates or Trusts)??		No
Did you have income or own shares in a partnership, trust, corporation, fiduciary or estate (not already reported on any U.S. Schedule K-1 listed above)?	No	No
Did you have business or self employment income/loss??		No
Miscellaneous Income		
Did you receive income from royalties/patents? ?		No
Did you have farming income/loss??		No
Did you receive interest income from a seller financed mortgage?	No	No
Did you receive unemployment benefits ?	No	No
Did you receive payments from a former spouse/civil partner under divorce/separation agreements (e.g. alimony, spousal support, maintenance payments) ?	No	No
Did you receive any tax refunds ?	No	No
Did you receive any gambling winnings ?	No	No
Did you receive any payments from an annuity??	No	No
Did you receive director's fees not already reported on a wage statement??	No	No
Did you receive any scholarship income ??	No	No
Did you have any debts forgiven?		No Answer
Did you have any other income not listed above (e.g. U.S. 1099-MISC)?	No	No
Did you have any transactions involving virtual currencies (eg. Bitcoin)?		No
Non-U.S. Financial Assets		
Do you individually or jointly have non-U.S. financial assets in excess of \$50,000 USD in total combined values on 31-Dec-2019 or more than \$75,000 USD at any time during 2019?		No
Enter any additional information regarding this page here?		No Answer
I have completed this page.		Checked

Tell us about your Deductions

Client: Anusha Konchada / TaxYear: 2019-2020

Real Estate Property

Did you have mortgage debt on ALL properties combined, that exceeds \$750,000 (or \$375,000 if married filing separate) at any time during the year?	No
Did you own real estate property that was your primary residence at any point during the year?	No
Did you own any other real estate not already reported in this Organizer including vacation homes (exclude any property rented the full tax year that you have already reported in the rental property section of this Organizer)??	No
Did you make energy efficient improvements or purchase energy efficient property for your principal residence or vacation home located in the U.S.?	No
Did you have a mortgage on any other real estate that has not been listed elsewhere in this Organizer?	No No

Tax Payments

Did you make any other income tax payments (e.g. payments for federal/state estimated tax, extensions, balances due) not reported on other pages in this Organizer?	No No
Did you pay personal property taxes or similar taxes (e.g. car, boat, trailer, motorcycle, motor home, vacant lot, etc.)?	No No
Did you save U.S. sales tax receipts in order to claim a sales tax deduction on your U.S. federal return?	No Answer
Did you pay U.S. state or local sales tax on the purchase of a motor vehicle, boat, plane, home, or home building materials?	No Answer

Contributions

Did you contribute to an approved political party?	No
Did you make cash (or monetary) contributions to approved charitable organizations ?	Yes
Did you donate non-cash items to approved charitable organizations?	No No

Medical and Health Care

Did you incur unreimbursed medical expenses for you or your family?	No Answer
Did you, your spouse and any dependents have healthcare coverage (health insurance) for the entire year?	Yes
Please select coverage type	Employer provided
Did you receive a Form 1095-C, Employer-Provided Health Insurance Offer and Coverage?	Yes
Did you have any transactions pertaining to a health savings account (HSA)?	No Answer
Did you have any transactions pertaining to a medical savings account (MSA)?	No Answer
Did you receive any distributions from long-term care insurance contracts?	No Answer
If you are self-employed, are you or your spouse eligible to be covered under an employer's health plan at another job?	No Answer
If you are self-employed, are you or your spouse eligible to be covered under an employer's long-term care plan at another job?	No Answer
Did you receive or expect to receive a U.S. Form 5498-SA?	No Answer

Insurance Premiums

Did you pay health insurance premiums (including long-term care insurance) while you were self-employed?	No No
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Education Expenses

Did you pay education expenses for yourself, your spouse or dependent(s)?	No No
Did you contribute or withdraw funds to/from a U.S. college savings plan (U.S. Section 529 plan)?	No No

Personal Expenses

Did you make payments to a former spouse under divorce/separation agreements (e.g. alimony, spousal support, maintenance payments, capital settlement)?	No No
Did you incur unreimbursed casualty or theft losses in a US federally declared disaster area?	No
Did you incur unreimbursed casualty or theft losses in association with your trade or business.	No
Did you make student loan payments?	No No
Did you pay qualifying child care expenses?	No No
Did you pay adoption expenses??	No No

Pension / Retirement Account Contributions

Did you make contributions to a U.S. traditional Individual Retirement Account (IRA) (Note: This does not apply to your employer sponsored 401(k) Contributions) ?	No	No
Did you make a contribution to a U.S. Roth IRA (Note: This does not apply to your employer sponsored Roth 401(k) Contributions)?	No	No
Did you have any other country retirement / pension plan(s) (including company or individual) that has not already been reported elsewhere in this Organizer?	No	No
Employee Expenses		
Did you work as a U.S. school teacher, counselor, principal, or teaching aid for over 900 hours during 2019?		No
Enter any additional information regarding this page here?	No	Answer
I have completed this page.		Checked

Cash charitable contributions

Client: Anusha Konchada / TaxYear: 2019-2020

Cash Charitable Contributions

	Countrywhere charity is registered?	Who contributed	Name of charity	Lump sum payment or Paid over year	Do you have appropriate documentation to support a U.S. tax deduction for this contribution?	Net amount paid	Is donation reported on your wage statement?
1	No Answer	(Choose)	No Answer	(Choose)	(Choose)	No Answer	No

	Currency same as registered country?
1	(Choose)

Did you use your car in the performance of services for a charitable organization?

No

Did you incur meals, lodging, parking fees or tolls in the performance of services for a charitable organization while away from home?

No

Enter any additional information regarding this page here:?

No Answer

I have completed this page.

Checked

Welcome

Client: Anusha Konchada / TaxYear: 2019-2020

Please confirm:

United States is (or was) my assignment country?	Agree
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Additionally, your Deloitte Representative has specified you may have (will be determined by Deloitte) income tax reporting requirements in: Ohio	Agree
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Once you have reviewed all the information above, please press "Begin" to open your Organizer.
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Tell us about anything else

Client: Anusha Konchada / TaxYear: 2019-2020

Do you want any tax refund owed to you sent directly to your bank account?	Yes	Yes
Did you sell any real estate that is not already reported in this Organizer?		No
Did you make a cash/non-cash gift to anyone in excess of \$15,000 (USD) including 529 plan?		No
Did you employ a domestic helper or employee in the U.S. ?	No	No
Did you receive a distribution from a non-U.S. trust?		No
Did you receive gifts from a non-U.S. person/entity?		No
Do you anticipate significant changes in your income over the next year which need to be considered in the preparation of estimated payments?	No	Answer

U.S. Use Tax on Out of State Purchase

Did you make U.S. internet or catalogue purchases on which no sales tax was paid while residing in a state that assesses a sales tax (see help for state list)?	No	Answer
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Preferred address and contact information

Preferred address to use on U.S. tax return	9272 Deercross Parkway
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Tax Shelter Reporting

Do you have any tax shelter(s) such as reportable transaction(s) or IRS listed transaction(s) that would require reporting/disclosing on your tax return?	No
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Mandatory Reporting Requirement of All Assets

Other Global Asset Reporting

Answer YES to questions below if you held any of the following items in any country that is NOT ALREADY REPORTED IN THE ORGANIZER at any time between 01-Jan-2019 and 31-Dec-2019

This is a reporting requirement for U.S. tax reporting purposes.

Did you have financial interest in , signature or other signature authority over.

. . . Any bank accounts not reported elsewhere in this Organizer?	No	No
...Any corporate financial accounts not reported elsewhere in this organizer?		No
. . . Any brokerage or securities accounts not reported elsewhere in this Organizer?		No
. . . Any pension / retirement accounts not reported elsewhere in this Organizer?		No
. . . Any life insurance or other capital investment accounts not reported elsewhere in this Organizer?	No	No
. . . Any mutual funds not already reporting in this Organizer?		No
. . . Any other financial asset and/or investment not reported elsewhere in this Organizer including non-income producing assets?	No	No
Check this box to confirm that all income from your financial accounts have been reported in this Organizer.		Checked
Are any of the assets or accounts reported in this organizer co-owned with someone other than spouse or dependents?		Yes

Mandatory U.S. Report of Foreign Bank Accounts

A) Non-U.S. bank accounts?	Yes
B) Non-U.S. brokerage or securities accounts?	No
C) Non-U.S. pension/retirement accounts (Including RRSP, PEP, etc.)?	No
If you held any Non-U.S. Financial Accounts, did the aggregate total amounts exceed the equivalent of \$10,000 (USD) at any time during the year?	Yes
Do you want Deloitte to prepare your mandatory FinCEN Form 114, US Report of Foreign Bank Accounts (FBAR), including any available extension request for additional time to file?	Yes
Are you compliant with all prior year FinCEN Form 114, US Report of Foreign Bank Accounts (FBAR) filing(s)?	No

U.S. Specific Questions

Did you receive a notification from the United States IRS or other U.S. State taxing authority indicating changes to your prior year return(s)?	No
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Ohio State Specific Questions

Do you want to contribute \$1 to the Ohio Political Party Fund?	No
---	----

Did you make any monetary contributions during the year to the campaign committee of candidates for any of the following Ohio offices:	None
Enter the details of the contribution(s)	No Answer
Did you have any qualified organ donation expenses?	No
Did you incur training expenses within 12 months of losing / leaving a job due to abolishment of a position or shift?	No
Did you pay for accident or health insurance premiums for you / your dependents?	No
Enter any additional information regarding this page here:?	No Answer
I have completed this page.	Checked

Tax refund bank deposit

Client: Anusha Konchada / TaxYear: 2019-2020

Bank Account For Refunds

	Country of bank	Account owner	Bank name	Bank routing number/BSB?	Bank account number?	Type of account
1	United States	Anusha	Chase	122100024	860275218	Checking

Enter any additional information regarding this page here:?

No Answer

I have completed this page.

Checked

Additional questions about your Organizer

Client: Anusha Konchada / TaxYear: 2019-2020

Enter any additional information regarding this page here:?

No Answer

This page is used to collect additional information to resolve inconsistent responses within your Organizer. If you do not have any questions listed below then no further information is required on this page.

I have completed this page.

Checked

Documents to be sent to Deloitte

Client: Anusha Konchada / TaxYear: 2019-2020

Requested on the U.S. wage statement Page

1. U.S. W2 Employer Wage Statement(s)

Requested on the Tell us about your Deductions Page

1. Provide a copy of any Form 1095-C, Employer-Provided Health Insurance Offer and Coverage, and/or Form 1095-B, Health Coverage, received for the year

You will securely upload all the above requested documents via the Documents tile on your Home page (after submitting your Tax Data Organizer).	Yes
If No, please detail the documents you will provide via other means.	No Answer
Check this box to indicate this page is complete.	Checked

One minute survey

Client: Anusha Konchada / TaxYear: 2019-2020

This Organizer was designed to make the complex task of gathering your tax data as simple as possible. We are aware that providing your tax data may never be an enjoyable experience, however we are continually trying to make your task as simple, fast, and convenient as possible.

How would you rate this Organizer? Good Product

How long did you spend entering information into this Organizer? Less than 1 hour

Did you have any issues getting access to this Organizer? No

Please provide any additional comments to help improve the Organizer.

Other Comments

	Comment
1	The organizer is really helpful and good to use to. However, if its someone's first time then it might take additional time as well. The only feedback i have is - I would appreciate if the GES team is able to respond quickly because there was a query i sent an email regarding (~ 2 weeks ago) and haven't heard back from them yet. Regards, Anusha

If you have any additional tax questions or concerns, please detail these at the bottom of the appropriate Organizer Page.

I have completed this page. Checked

Additional Comments

I

I Started on this project on 3-Sept 2019 however, i physically moved to BlueAsh (OH) on 8th Dec 2019

I Georgia- Jan 2019 through Dec8th 2019 Ohio- Dec8th 2019 through Current date Please note that i was travelling 4 days a week between Atlanta (GA) and Cincinnati from Sept9th 2019 through Nov 22nd 2019. 4 days in Ohio and 1 day in Atlanta- Just an FYI, not sure if this info. helps