

TAX INFORMATION FORM

Mentioning below required details will help us to get you **\$3,000 to \$10,000** more **Genuine Tax Refunds, when compared with any other Tax Estimate** of the United States.

Your tax estimate will be ready in just 2 hours.

For any Assistance or Questions please call us on **315-961-6434**,
We will be more than happy to assist you.

Fill the below Basic details (Mandatory)

Particulars as per SSN	Primary Tax Payer	Spouse	Child 1	Child 2	Other Dependent
FIRST NAME					
MIDDLE NAME					
LAST NAME					
DATE OF BIRTH (MM/DD/YY)					
SSN/ITIN					
OCCUPATION					
MOBILE NUMBER					
Choice: WORK PHONE NUMBER with Extension Number					
EMAIL ID					
RELATIONSHIP WITH PRIMARY TAXPAYER					
VISA TYPE AS ON DECEMBER 31 ST 2022					
Any Change in Visa Status during the year 2022					
MARRIED/UNMARRIED/DIVORCED IN 2022					
DATE OF MARRIAGE (MM/DD/YY)					
CURRENT MAILING ADDRESS WITH ZIP CODE.					
USA First Port of Entry					
Are you going to stay for more than 6 months in 2023 (Yes/No)					
No. of days Stayed in US in the year 2022					

Do not worry, if your dependents do not have SSN, we will apply ITIN for them since it is mandatory to claim Tax Credit.

****CLAIMABLE EXPENSES****

S.No	Description	Expenses(\$)
1.	Monthly Rent	
2.	Utility Bills Payment for entire Year	
3.	Cell phone Bill payment per month	
4.	Internet bill payment for per month	
5.	Did you buy a laptop (Mention the cost)	
6.	Did you buy a TAB (Mention the Cost)	
7.	Did you buy a mobile(Mention the cost)	
8.	Did you spend any amount on courses online or offline?	
9.	Any loss in stocks	
10.	Crypto/Virtual Currency Loss	
11.	Bought any Electric Vehicle	
12.	Total Medical &Dental Expenses	
13.	Home mortgage interest including points	
14.	Property taxes paid in US	
15.	Property Taxes paid in India	
16.	Paid any Tuition fees	
17.	Gambling losses	
18.	Any Donations to Charity & Gifts Amount	
19.	Causality or theft losses	
20.	Paid insurance(Out of your pocket)	

INCOME DETAILS (Additional Questions)

1.	DID YOU WORK FROM HOME IN 2022?	
2.	DO YOU ALREADY HAVE A BUSINESS?	
3.	ARE YOU CONNECTED WITH A BUSINESS IN FORIGEN COUNTRY?	
4.	ARE YOU PLANNING TO INCORPORATE A BUSINESS?	
5.	DID YOU INVEST IN STOCKS?	
6.	RECEIVED ECONOMIC IMPACT PAYMENT?	

Did you receive Advance Child Tax Credit, if yes please mention the amount:

Received \$250/\$300 mention the whole amount.

Total Months in 2022	Amount Received During no of Months	Received Total Amount

For cross verification please email us or upload Received IRS Letter 6419 on www.grandtaxfilers.com

Received any Economic Impact Payments in 2022? If yes please mention below:

PAYMENT TYPE	YES/NO	AMOUNT RECEIVED

Email us or upload IRS Letter 6475on to your account with www.grandtaxfilers.com

IMPORTANT: As per your knowledge please mention your total number of present days of 2020, 2021, and 2022, if you have not stayed 182 days in 2022.

		Taxpayer				Spouse	
Tax	Stat	From	To	Stat	From(MM/DD/YYYY	To(MM/DD/YYYY	

Year	Month	(MM/DD/YYYY)	(MM/DD/YYYY)	Year	Month	(MM/DD/YYYY)
2022						
2021						
2020						

File tax returns if you have stayed in Kentucky, Michigan, New York, Ohio, Pennsylvania, Indiana, Iowa, or Maryland.

Claim RENTAL DEDUCTION or RENTAL CREDITS, if resided in CA, IN, MA, NJ, MN, or WI.

State	Rent Paid Per Month	Number of Months Stayed

Claim your HSA and IRA Contributions:

Account Type	Contribution of Taxpayer Amount	Contribution of Spouse Amount
a) HSA: Health Savings Account		
b) Traditional IRA: Individual Retirement Accountant		

Please email us or upload the below required documents on www.grandtaxfilers.com, your documents will help us to claim your additional deductions and credits to increase tax refunds.

Did you or your Spouse receive the below documents	YES/NO
1098 (Mortgage Interest Statement)	
1098 – T (Tuition Fees Paid)	
1098 – E (Student Loan Interest Statement)	
1099 – B (Proceeds from Broker and Barter Exchange Transactions) supplemental/consolidated/Employer stock forms like: RSU/ESPP/3922/3921.	
1099 -C (Cancellation of Debt)	
1099 – DIV (Dividends and Distributions)	
1099 – G (Certain Government Payments)	
1099 – HC from Massachusetts	
1099 – INT (Interest Income Statement)	
1099 –K (Payment Card and Third-Party Network Transactions)	
1099 – MISC (Miscellaneous Income)	
1099 – OID (Original Issue Discount)	
1099 – Q (Payments from Qualified Education Programs Under Sections 529 and 530)	
1099 – R (Distributions from Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts)	
1099-SA (Distributions From an HSA, Archer MSA, or Medicare Advantage MSA)	
W2 - G (Gambling Winnings)	
1095 – A (Market Place Health Insurance)	

Claim Rental Expenses and Report Rental Income

Particulars	Details
1. Type of Property	
2. Address and Location	
3. a. No. of months rented in the year 2022	

b. No. of months you used for personal	
4. Who owns the Property (Taxpayer/Spouse/Joint)	
5. Date of Purchase of the Property (MM/DD/YYYY)	
6. Property Cost	
7. Received Total Rental Income	
8. Expenses of the Property	

Mention Your Other Income:

Type of Income	Amount of Tax Payer	Amount of Spouse
1) Form1099-MISC Self-Employment Income		
2) Gambling Income		
3) Gambling Losses (Gambling losses are claimable up your Gambling Income)		

Report your FBAR / FATCA:

	Taxpayer (Yes/No)	Spouse (Yes/No)
FBAR REPORTING: Did you have more than \$10,000 in your Foreign Accounts at any time during the Tax Year 2022?		
FATCA FILING: Did you have more than \$50,000 in your Foreign Accounts at any time during the Tax Year 2022?		

FBAR/FATCA Reporting is Mandatory: Non-Filing of FBAR/FATCA leads to the penalty between \$ 12,921 to \$ 29,210 or 50% of the account balance, if you are eligible to file FBAR/FATCA we will report it for FREE, so please do not miss reporting.

Reporting Your Foreign Income to Avoid Penalties.

Particulars	Salary Income (INR)	Dividend Income(INR)	Interest Income(INR)	Rental Income(INR)
1. Foreign Income TYPE				
2. Amount of Foreign Income				
3. Total Foreign Taxes Paid				

Claim your Electric / Hybrid Car Credit for 2022?

Year of Vehicle	
Make of a Vehicle	
Model of Vehicle	
Number of Wheels	
Vehicle Identification Number	
The date of the vehicle was placed in service	
Cost of the Vehicle	

NOTE TO TAX PREPARER: Mention additional information, service improvement, best way and time to reach you, or any kind of feedback or expectation, you will have our spontaneous response.

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MANDATORY: We require all your Tax Source Documents for the Preparation of your Tax Return.

Form W2 / W2C (Mandatory)

All 1099 Documents like 1099-INT, 1099-DIV, 1099B, 1099-MISC, 1099-G,1099-R

Last Year Federal & State Tax Return (mandatory)

Estimated Tax Payments – Form 1040ES

Income from S-Corp/LLP/LLC – Schedule K1

Please help us with your Friends and colleagues’ contact details below to help them enjoy our below-mentioned tax services worth **\$3,000 for FREE OF COST**, if they file through us, we will honor you with **\$15per Paid Referral**.

NAME OF YOUR FRIENDS, FAMILY& COLLEAGUES	EMAIL ADDRESS	CONTACT NUMBERS

Always Remember: As you have opted for the most Accurate Tax Estimate, henceforth you are entitled to enjoy our below-mentioned **\$3000 worth FREE OF COST**

- **Unlimited Consultations Throughout the Year**
- **Audit Support on your All Years Tax Returns**
- **11 Super Quality Value Added Tax Services**
- **10 Additional Benefits**
- **100% Data Security**
- **100% Satisfaction**

“Need help in below tax filing for your Businesses; we can be an absolute choice.”

1. **Sole Proprietorship**
2. **Partnership**
3. **Limited Liability Company**
4. **Business Corporation**

Other Tax Services for Businesses:

- **Book Keeping**
- **Payroll Management**

- **Accounting**
- **Business Incorporation**

Grand Tax Filers is adhered to strictly following the Data Protection Laws of the U.S. and India, which is an obligation to use your details only for your tax return preparation/planning rather than any other purposes. Once again thanks a lot for your time spent on providing your details, we promise you that you will receive your tax returns as tax estimates in just **2 hours** and will even have complete satisfactory customer service. For any inquiries, please email us through taxsupport@Grandtaxfilers.com and you can call us on **+1 315-961-6434**.