**WELCOME TO BRIGADE TAX**

**TAX PLANNER FOR TY 2024**

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**PLEASE fill in the information below whichever applies to you for the Tax Year 2024**

**TAX PLANNER FOR TY 2024**

* We request you to fill in the following details which will help us to analyze your current tax position and help you with effective tax-saving solutions.
* We always believe in the BEST of our services which defiantly. Gives you an accurate Tax Planning/Filing.

**File your Tax Returns with Brigade Tax & Get Value-added services worth:- $ 1499 at no COST\*\*\***

* Advance Tax Planning Services (For TY 2024)
* Tax Representation Services (For audits/notices)
* ITIN Processing (Form W7 for Spouse/Kids/Dependents)
* FBAR & FATCA Processing (Mandatory per IRS)
* Extension Filing (For Federal/State)
* Managed Hosting Services (For any communication by IRS/State)
* Planning Charges may apply for Itemized Deductions which is less than $99
* Indian Tax Filing

Personal Details:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Particulars** | **Taxpayer** | **Spouse** | **Dependent 1** | **Dependent 2** |
| First Name |  |  |  |  |
| Middle Name |  |  |  |  |
| Last Name |  |  |  |  |
| SSN / ITIN |  |  |  |  |
| Date of Birth (mm/dd/yy) |  |  |  |  |
| Occupation |  |  |  |  |
| Home Number |  |  |  |  |
| Cell Number |  |  |  |  |
| Email Id |  |  |  |  |
| Current Address |  |  |  |  |
| Marital Status as on Dec 31, 2024 (Single or Married) |  |  |  |  |
| Date of Marriage (mm/dd/yy) |  |  |  |  |
| Visa Type as on Dec 31, 2024 |  |  |  |  |
| Was there any change in the Visa Status during 2024? Mention dates |  |  |  |  |

**NOTE:** SSN or ITIN is mandatory to file taxes, if you don’t have for your Spouse/Dependents, no worries we can help you to apply for ITIN NOW.

Residency Details:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Particulars** | **Taxpayer** | **Spouse** | **Dependent 1** | **Dependent 2** |
| First Port of Entry Date into US (mm/dd/yy) |  |  |  |  |
| No. of months stayed in US during 2024 |  |  |  |  |
| Will you stay in US for more than 6 months in 2025?  (Write Yes or No) |  |  |  |  |

**NOTE:** Please fill in all information properly for ALL the tax years listed above. This will help our Tax Experts to determine your correct "Residential Status" Also we can work on your previous year's tax returns to get you any additional refund that you missed out on.

Bank Details :( For Direct Deposit of Refund / Auto Withdrawal of Owe Amount):

|  |  |
| --- | --- |
| Bank Name |  |
| Routing Number (Electronic) |  |
| Account Number |  |
| Account Type (Savings/Checking) |  |
| Account Owner Name |  |

States Resided:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Tax Year | Taxpayer | | Spouse | |
| States Resided | Period of Stay  (From Date & To Date)  (mm/dd/yy) | States Resided | Period of Stay  (From Date & To Date)  (mm/dd/yy) |
| 2024 |  |  |  |  |
| 2023 |  |  |  |  |
| 2022 |  |  |  |  |

**NOTE:** Please fill in all information properly for ALL the tax years listed above. This will help our Tax Experts to determine your correct "Residential Status" Also we can work on your previous year's tax returns to get you any additional refund that you missed out on.

If you are a Resident of CA, IN, MA, MN, NJ or WI State, Please Fill the below:

|  |  |  |
| --- | --- | --- |
| State | Rent Per Month | Number of Months Stayed |
|  |  |  |

**NOTE:** Please fill in all information properly to see if you are eligible for a rental deduction for a state.

Employment Details:

|  |  |  |
| --- | --- | --- |
|  | **Taxpayer** | **Spouse** |
| Name of the Employer |  |  |
| Employer Location (City, State) |  |  |
| Designation |  |  |
| Occupation |  |  |
| Employment Start Date |  |  |
| Employment End Date |  |  |
| Visa Status |  |  |

**NOTE:** Copy & paste the above table if you have worked for multiple employers in 2024.

Rental Income (If Any):

|  |  |
| --- | --- |
| **Particulars** | **Details** |
| Property Type? (Residential/Commercial) |  |
| Location/Address |  |
| Specify the following:  No. of months rented in the year 2024  No. of months you used for personal purpose |  |
| Property is owned by (Taxpayer/Spouse/Joint) |  |
| The date this property was purchased (mm/dd/yyyy) |  |
| Cost of the property |  |
| Rental Income received in the year 2024 |  |
| Rental Expenses incurred to earn Rent if any (provide breakdown) |  |
| Property Taxes |  |

**NOTE:** it is applicable only if you had any Rental Income of Residential/Commercial Property.

Foreign Income & Expenses (If Any):

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Particulars** | **Salary Income** | **Business/ self-employed income** | **Dividend Income** | **Interest Income** | **Other income (capital gain, Rental Income etc.)** |
| Foreign Income from which source |  |  |  |  |  |
| Amount of Foreign Income |  |  |  |  |  |
| Foreign Taxes (if any) withheld |  |  |  |  |  |

Sale & Purchase of Stocks (ISOs, ESPPs, & Securities)

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Purchase Details** | | | | | **Sale Details** | | | | |
| Date Purchased | Stock Description | Quantity | Rate per Unit | Total = Qty \* Rate | Date Sold | Stock Description | Quantity | Rate per Unit | Total = Qty \* Rate |
|  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |

**NOTE**: Please note that you may be charged $5 for each extra page of your Schedule D while the first page is FREE of 20 transactions. (Please Double Click on the above-given table to add the transactions in a spreadsheet quickly).

Education Expenses:

|  |  |  |
| --- | --- | --- |
| **Expense Type** | **Taxpayer**  **$ Amount** | **Spouse**  **$ Amount** |
| c) Student Loan Interest Paid in US - Provide Form 1098-E |  |  |
| d) Tuition Fees Paid in US - Provide Form 1098-T |  |  |

Child & Dependent Care Expenses:

|  |  |
| --- | --- |
| a. Name of the Dependent for whom these expenses were incurred |  |
| b. Name and address of the Care provider (Institution/Person) |  |
| c. Federal ID/SSN of the Care provider (Institution/Person) |  |
| d. Amount of Expenditure Incurred |  |
| e. Amount reimbursed by the Employer, if any |  |

**NOTE:** Enter the below details only if Spouse is working or Full time student or Disabled. (Enter the expenses incurred for day care / preschool / nursery).

Other Expenses:

|  |  |  |
| --- | --- | --- |
| a) Last Year Tax Preparation Fees |  |  |
| b) Home Mortgage Interest & Points (For property in the US) - Provide Form 1098 - Enter only the Interest Amount not your EMI |  |  |
| c) Property Taxes (For property in the US) |  |  |
| d) Home Mortgage Interest (For property in India/Foreign Country) - Please mention Bank Name, Bank Address & Interest Amount in USD - Provide only Interest Amount not your EMI |  |  |
| e) Student Loan Interest Paid in the US - Provide Form 1098-E |  |  |
| f) Tuition Fees Paid in the US - Provide Form 1098-T |  |  |
| g) Contributions to Traditional IRA (Individual Retirement Account) - This is not 401K provided by your Employer. If Roth IRA, please mention Roth IRA |  |  |
| h) Contributions to HSA (Health Savings Account) - Provide Supporting Doc |  |  |
| i) Safe Deposit Box Rental / Margin Interest on Stocks |  |  |
| j) Educator Expenses (if you/your spouse is a Teacher/Faculty) |  |  |
| k) Charitable contributions made and Miles driven to visit the charitable institution. |  |  |
| l) Medical Expenses (Read Note Below) |  |  |
| m) Any state refunds for TY-2023? |  |  |
| n) Cost of Energy Saving Equipment (E.g. Solar Water Heater, Boiler, Skylights, Electric Heat Pump, Natural Gas Propane, Metal Roofing, Wooden Furnace, etc.) - Mention Equipment Purchased & Cost |  |  |
| o) Any other expenses not listed above |  |  |

FBAR/FATCA:

|  |  |  |
| --- | --- | --- |
| **Particulars** | **Taxpayer (Yes/No)** | **Spouse (Yes/No)** |
| 1. Did you have more than $10,000 in your Foreign Accounts at any time during the Tax Year 2024? |  |  |
| 2. Did you have more than $50,000 in your Foreign Accounts at any time during the Tax Year 2024? |  |  |

**NOTE:** Should file FBAR (Foreign Bank Account Report) before April 15, 2025, if the aggregate of your Bank Accounts/Securities Accounts/Other Financial Accounts exceeded $10,000 at any time during the tax year 2024. You may have to file FATCA (Foreign Account Tax Compliance Act) before April 15, 2025, with your tax return if the aggregate of your Bank Accounts/Securities Accounts/Other Financial Accounts exceeded $50,000 at any time during the tax year 2024.

Notes to Tax Preparer:

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# If you\your spouse have below documents please upload or e-mail along with tax Planner.

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| --- |
| * Properly filled Tax Planner of 2024 (mandatory) |
| * Wage Income – Form W2/Corrected W2 (mandatory) |
| * Last Year Federal & State Tax Return (Mandatory) |
| * Interest Income – Form 1099-INT |
| * Dividend Income – Form 1099-DIV |
| * State Tax Refund/Unemployment Compensation – Form 1099-G |
| * Self-Employment Income/Business Income – Form 1099-MISC |
| * Sale of Shares/Securities – Form 1099-B |
| * Retirement Distributions – Form 1099-R |
| * Rental Income from US Property |
| * Foreign Tax Certificate (if you made any income from a foreign country during 2024) |
| * Student Loan Interest – Form 1098-E |
| * Home Mortgage Interest – Form 1098 |
| * Tuition Statement - Form 1098-T |

**PLEASE Refer Friends/Colleagues and earn $UNTLIMITED$:**

How it works:

* Share your unique referral link on All Social Media Pages or via email/Phone but do not forget to ask your friends/colleagues and family friends to use Referral Code.
* Your referee must give your reference to us to get $10 waved off if they file taxes within 15 days of signing up and you will get $10 as a referral bonus.
* If you introduce us to your employer, you can get your tax filed as FREE for every year\*\*\*\*\*
* If you refer us to any of the Indian Organization for which you might be a part of it, you can get your tax filed FREE for every YEAR.
* You might be the part of many groups in “WhatsApp or Any Social Groups” do post our flyers/content/ about us as reference well for every successful Tax Filing will honor you with a referral bonus of $10 per paid client.

**We would be pleased to honor you with a Referral Bonus of Up to $100 and More\* for referrals. Please help us with their Name with Contact Number along with Email ID!**

**“Few things make us as happy as seeing our clients years later living out the dreams we once spoke of and designed strategies to fulfill.”**