## Client Tax Organizer



Maheswari Shanmugam 9716 Bloomfield Ave, Cypress, CA 90630

Tel: 714-602-6560

Email: magi@technotax.net

www.technotax.net

Bond #: 106824130 / www.ctec.org

Taxpayer Information							
First Name:			Last Name:				
Date of Birth:			SSN/ITIN:				
Address (US Address):							
Address:(Foreign Address	s residing outside US):						
Phone No 1:			Email 1:				
Phone No 2:			Email 2:				
Spouse Information							
First Name:			Last Name:				
Date of Birth:			SSN/ITIN:				
Dependent Information			•				
First Name Last Name		ne	Date of Birth			SSN/ITIN	
Health Insurance (Proof	of health insurance covera	age )					
Form 1095-A if you enrol	led in an insurance plan th	nrough the Ma	arketplace (E	Exchange)			
· · · · · · · · · · · · · · · · · · ·	5-C if you had insurance co				olover,	insurance company, or	
-	such as Medicare, Medica	•	•		, ,	, ,,	
	certificate (ECN) if you app				Market	place (Exchange)	
'	, , , , , , , , , , , , , , , , , , , ,			·		1 ( 0 /	
Last year Tax copy (if you	u are new client)						
Driver License or State ID (for both you and your spouse)							
	, ,	,					
Bank Information (for re	funds or debit of taxes)						
BANK NAME: ROUTING NO:			ACCOUNT NO: CH		CHEC	KING SAVINGS	
ACCOUNT OWNERS NAME:							
Estimated Taxes	Q1 (Jan 1- Apr 17)	Q2 (Apr 18 -	- June 15)	Q3 (June 16- Sept	17)	Q4 (Sept 18 – Jan 15)	
Federal	\$	\$		\$		\$	
State	\$	\$		\$		\$	
Foreign taxes paid (if any) \$				1 -		1 -	
<u> </u>	• •						

Sources of Income from US & Outside US (Worldwide income should be reported)				
	United States	Worldwide Income		
Employed Forms W-2		Salary \$		
Unemployed	Unemployment / Paid family Leave - 1099 G			
Self-Employed	Form 1099 Business Income	Business Income \$		
	Schedules K-1	Partnership \$		

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Savings & Investments or Dividends United States	Wouldwide Income
Interest Income 1099-INT	Worldwide Income Interest Income \$
Dividend Income 1099-DIV	*
	Dividend Income \$
Income from sales of stock 1099-B	Stock Sales \$
Retirement Income - 1099 R	Retirement Income \$
Income from sales of other property 1099-S	Home Sale \$
Rental Income (Attach worksheet)	Rental Income \$
Other	Other \$
Other Income & Losses	
United States	Worldwide Income
Health savings account 1099 -SA	Other \$
1099 SAA -Social Security	
State tax refund 1099 -G	
Gambling Income & Losses w2 G	
1099 MISC	
Jury duty records	
Prizes & Awards	
Hobby & Expenses	
· ·	
Retirement & Other Savings	
Traditional IRA \$	ROTH IRA \$
SEP IRA \$	Non Deductible IRA \$
HSA \$	
Educator Expenses	
Receipts for classroom expenses (for educators in grade	es K-12)
Educational Expenses	
Forms 1098-T from educational institutions	Records of any scholarships or fellowships you received
Receipts that itemize qualified educational expenses	Form 1098-E if you paid student loan interest
necespts that itemize qualified educational expenses	Total 1000 Lan you paid student loan interest
Childcare Expenses	
Attach Final summary for fees paid to school or individu	al
Fees paid to a licensed day care center or family day car	e for care of an infant or preschooler
Medical Expenses (Must exceed 7.5 % of your adjusted	
Amounts paid for healthcare insurance and to doctors, or	dentists, hospitals
State & Local Taxes	
•	\$
Invoice showing amount of vehicle sales tax paid & DM\	/ fees \$

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Deductions						
Home ownership						
Home Mortgage Interest Form 1098	Home Mortgage paid to Foreign Bank:					
Property taxes paid \$	Bank Name:					
rical estate and personal property tax records	Bank Address:					
	Interest paid in USD: \$					
Receipts for energy-saving home improvements (i.e. solar pa	anels, solar water heater)					
Casualty & Theft Loss \$						
Charitable Donations						
Cash amounts donated to houses of worship, schools, other charitable organization						
Receipts of non-cash charitable donations						
Amounts of miles driven for charitable						
Moving Expenses (Only members Armed force on active du	ty & move is for permanent change of station)					
Moving Date	Miles Moved					
Storage & Transportation \$	Travel & Lodging (No Meals) \$					
Reimbursed by Government \$						
FBAR Requirement						
<ol> <li>Do you have any foreign bank account(s)?</li> </ol>						
2. If yes, did the aggregate value of your foreign bank a	account(s) exceed \$10,000 USD?					
3. If yes, did the aggregate value exceed \$50,000 USD (	(if Single), OR \$100,000 USD (if Married)?					
If you answered yes to any of the above you may he	ave a Fin CEN 114 (FBAR) filing requirement.					
Filing is due by April 15th, 2020, and can be complet	ed @					
https://bsaefiling.fincen.treas.gov/main.html						
Notes						