

Client Tax Organizer



Maheswari Shanmugam
5562 Fox Hills Ave, Buena Park, CA 90621
Tel: 714-602-6560
Email: magi@technotax.net
www.technotax.net
Bond #: 100588716 / www.ctec.org

Taxpayer Information			
First Name:		Last Name :	
Date of Birth:		SSN/ITIN:	
Address (US Address):			
Address:(Foreign Address 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	Date of Birth	SSN/ITIN

Important! Do any of the dependent(s) listed above have an SSN card with “Not Valid for Employment”? If so, please specify which dependent(s):

Please provide medical/healthcare statements or school records or childcare provider records of your dependents verifying their residency in the U.S to receive the child tax credit. It should have the children’s name and home_address. We can also use Form 1095- (A or B, or C) that was sent to you by your insurance company or employer. This is a mandatory requirement by the IRS. For more details click on this [link](#).

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Cryptocurrency – [IRS LINK]	
At any time during 2024, did you receive, sell, exchange, gift or dispose of digital assets?	<input type="checkbox"/> Yes <input type="checkbox"/> No

Health Insurance (Proof of health insurance coverage) [Send Copies of 1095- (A or B or C)]	
Form 1095-A if you enrolled in an insurance plan through the Marketplace (Exchange)	
Form 1095-B and/or 1095-C if you had insurance coverage through any other source (i.e., an employer, insurance company, or government marketplace.)	
Marketplace exemption certificate (ECN) if you applied for and received an exemption from the Marketplace (Exchange)	

Last year Tax copy (if you are new client)	Send copies
Driver License or State ID (for both you and your spouse)	Send copies

Bank Information (for refunds or debit of taxes)		
BANK NAME:	ROUTING NO:	ACCOUNT NO:
ACCOUNT OWNERS NAME:		<input type="checkbox"/> Checking <input type="checkbox"/> Savings

Estimated Taxes	Q1 (Jan 1- Apr 15)	Q2 Apr 16 – June 17)	Q3 (June 18- Sept 16)	Q4 (Sept 17 – Jan 15)
Federal				
State				
Foreign taxes paid (if any)				

Sources of Income from US & Outside US (Worldwide income should be reported)		
	United States	Worldwide Income
Employed	Forms W-2 - Send copies	Salary
Unemployed	Unemployment / Paid family Leave - 1099 G - Send copies	

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Self-Employed	1099 MISC - Send copies /(Request for a worksheet)	Business Income (Request for a worksheet)
	Schedules K-1(LLC, SCORP and Partnership) - Send copies	
	1099-K – Send copies	1099-NEC – Send copies
Savings & Investments or Dividends		
United States		Worldwide Income - Click this link for conversion
	Interest Income 1099-INT - Send copies	Interest Income
	Dividend Income 1099-DIV - Send copies	Dividend Income
	Income from sales of stock 1099-B - Send copies	Stock Sales
	Retirement Income - 1099 R - Send copies	Retirement Income
	Income from sales of other property 1099-S - Send copies	Home Sale
	Rental Income (Request for a worksheet)	Rental Income (Request for a worksheet)
		Other
Other Income & Losses		
United States		Worldwide Income
	Health savings account 1099 -SA - Send copies	Other
	1099 SAA -Social Security - Send copies	
	State tax refund 1099 -G - Send copies	
	Gambling Income & Losses w2 G - Send copies	
	1099 MISC - Send copies	
	Jury duty records - Send copies	
	Prizes & Awards - Send copies	
	Hobby & Expenses - Send copies	

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Retirement & Other Savings	
Traditional IRA	ROTH IRA
SEP IRA	Non-Deductible IRA
HSA	Backdoor ROTH
Educator Expenses	
Receipts for classroom expenses (for educators in grades K-12)	
Educational Expenses	
Forms 1098-T from educational institutions - Send copies	Records of any scholarships or fellowships you received - Send copies
Receipts that itemize qualified educational expenses - Send copies	Form 1098-E if you paid student loan interest - Send copies
Childcare Expenses	
Attach Final summary for fees paid to school or individual - Send copies	
Fees paid to a licensed day care center or family day care for care of an infant or preschooler - Send copies	
Medical Expenses (Must exceed 7.5 % of your adjusted gross income)	
Amounts paid for healthcare insurance and to doctors, dentists, hospitals - Send copies	
State & Local Taxes	
Amount of state/local income taxes paid	
Invoice showing amount of vehicle sales tax paid & DMV fees	
Deductions	
Home ownership	
Home Mortgage Interest Form 1098 - Send copies	Home Mortgage paid to Foreign Bank: Bank Name: Bank Address: Interest paid in USD:
Property taxes paid	

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Real estate and personal property tax records	
Receipts for energy-saving home improvements (i.e., solar panels, solar water heater) - Send copies	
Casualty & Theft Loss	
Charitable Donations	
Cash amounts donated to houses of worship, schools, other charitable organization – Send copies	
Receipts of non-cash charitable donations – Send copies	
Amounts of miles driven for charitable:	
Moving Expenses (Only members Armed force on active duty & move is for permanent change of station)	
Moving Date:	Miles Moved:
Storage & Transportation	Travel & Lodging (No Meals)
Reimbursed by Government	
Solar and Electric Vehicles Credits: (Does not apply to leased equipment or vehicles).	
<ul style="list-style-type: none"> • Did you purchase and install Solar Panels to your home in 2023? If so, please provide the invoice that reflects the date of purchase and the amount paid in total. Did you purchase a qualified Electric Vehicle in 2024? If so, please provide the dealership may have "transferred" a tax credit to you at the time of purchase. The dealership should give you IRS Form 15400, showing any credit received. Please make sure we get a copy of that form during this year's tax preparation. 	
Misc. Work/Business Expense: The 2017 Tax Cuts and Jobs Act suspended all miscellaneous itemized deductions that are subject to the 2% of adjusted gross income floor. This change affects unreimbursed employee expenses such as uniforms, union dues and the deduction for business-related meals, entertainment and travel, and home office. However (depending on the state), you may be eligible to claim them against your state income. Please list your qualified work/business expenses below:	

