

Customer Name : User Test yaali

Tax Tear : 2020

Filing Status : Resubmitted

Staff Filing Status : Reviewer 1

Notes

To Do List

Action Item# : 1

Accounting Year : 2020

Date Assigned : 09-Jun-2021

Category : Basic Info

Description : 1. 1. 1. 1. test

Due Date : 15-Jul-2021

Resolution : test

Date resolved : 09-Jun-2021

Status : Closed

Us Bank Account

Name of Bank : test bank

Account number : 2432254436

Routing number : 4648595745

What type of account it is? Saving

Tax Payments

Date of payments : 05-May-2021

Amount of payments : 2000.00

Estimated Tax Payments

Date of payments : 31-May-2021

Amount of payments 4000.00

Price Proposal

Basic Information

Accounting Year : 2020

Please select the type of reporting for the current tax year : Tax Return Only

Name : User Test yaali

Profession : pro

Spouse Profession : spouse pro

Has your address changed during the tax year? : Yes

Please elaborate: Yes

Address: add1, add2, city, Israel, 600001, Israel

Was there a changes in ownership during the current tax year?:

Does the entity have \$10,000 or more in cumulative financials accounts outside the United States:

Has there been a change in your family status in the tax year? : Yes

Please elaborate : test family change

Did you make any withdrawals from a kerenhishtalmut, pension, or gemel during the tax year? : Yes

Please elaborate : test family change

At any time during tax year, did you receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currency (like Bitcoin)? : Yes

Please elaborate : test you receive, sell, send, exchange, or otherwise acquire

Did you have any additional income in the tax year that you did not have in the prior tax year (rental income, K1, investments)? : Yes

Please elaborate : test additional income

Is the ITIN number valid? : Yes

Do you have a US visa? If yes, please upload a copy in Upload Documents : No

How many days were you in the US during the tax year? :

Are you reporting any dependent children? : Yes

Are you reporting any rental properties? : Yes

Are you reporting any Israeli Corporations? : Yes

Are you reporting the sale of a property : Yes

Did you receive an inheritance or gift from a non US Citizen : Yes

Would you like the refund or amount owed deposited or withdrawn directly from your US bank account : Yes

Did you make any tax prepayments for the current tax year : Yes

Did you make any estimated tax payments for the current tax year :

Were you entitled to the Corona Stimulus payments and did not receive the first or second payments? : Yes

Please elaborate : test Corona Stimulus payments

How many payments did you submit :

Anything you want to let us know regarding this tax return : Yes

Please write so here – : test want to let us know

List of Uploaded Documents

Other : 1

Teudat Zehut+Sephach, Social Security Card : 1

1099 INT, 1099-DIV, 1099-S, 1099-R : 1

Form 867 : 1

Form 106 / W2 : 1

FBAR Accounts

Financial Accounts Owned Separately

Financial Institution	Account Type	Account Number	Maximum Value
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Financial Accounts Owned Jointly

Financial Institution	Account Type	Account Number	Maximum Value
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Financial Accounts Where Filer Has Signature

Financial Institution	Account Type	Account Number	Maximum Value
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Children Report

Did all the children claimed on your tax return, reside with you at least 6 months during the tax year? If no, please provide the specifics as to why not.Yes

Please explaintest claimed on

Did you support the children claimed on your tax return? If no, please provide the specifics as to why not.Yes

Please explaintest support the children claimed o

Has the credit ever been reduced or disallowed for any other reason other than clerical or mathematical error? If yes, please provide specifics for the reduction or disallowance.Yes

Please explaintest credit ever been reduced

For children of divorced parents, has a Form 8332, Release /Revocation Of Claim to Exemption for Child by Custodial Parent or a similar statement been filed?Yes

Please explaintest claimed on

If your filing status is Head of Household, do you make more than your spouse?Yes

If you make more than your spouse , then do you provide more than half of the cost of keeping up the home for the children you are claiming?Yes

Rental Properties

Rental Properties 1

Address : p Add 1, p Add 2, p city, state, 444334, Israel

Number of owners : 2

Purchase date : 02-Feb-2021

Currency : ILS

Purchase price : 4566

Did you report this property previously (last tax year) : Yes

Total rental income during tax year : 1000

Total rental expenses during tax year : 400

Maintenance : 50

Insurance : 50

Management Fees : 34

Repairs : 50

Home Improvements / Capital Expenditures : 34

Total income tax paid in Israel : 34

Other expense : 23

Corporations

Corporation : 1

Corporation : sheela A

Did you report this corporation previously (last tax year) : Yes

Dividends distributed : yehjhfhg

Taxes paid during tax year : yhjvvgkj

Same number of owners as last year : No

Number of owners : 5

Same percentage of ownership as last year (last tax year) : No

Percentage of owners : 6.00

Sale of a Property

Property 1

Address : p Add 1, p Add 2, p city, state, 444334, Israel

Number of owners : 2

Purchase date : 02-Feb-2021

Currency : ILS

Purchase price : 4566.00

Number of years lived in the dwelling : 5

Purchase date : 02-Feb-2021

Purchase price : 4566.00

Did you report this property previously (last tax year) :

Sale date : 02-Jun-2021

Sale price (include realtor fees, lawyer fees) : 40000.00

Total income tax paid : 5000.00

Inheritances & Gifts

Inheritances & Gifts 1

Reporting an inheritance or gift : Inheritance

From whom was the inheritance/gift : Yes

What was the inheritance / gift : test gift

What was the value of each item received (cash, property, accounts) : 866333343