

Last or Family Name: \_\_\_\_\_ First: \_\_\_\_\_ Middle Initial: \_\_\_\_\_

ITIN or Social Security #: \_\_\_\_\_ Visa #: \_\_\_\_\_ Passport #: \_\_\_\_\_

Date of Birth: \_\_\_\_/\_\_\_\_/\_\_\_\_ Telephone #: \_\_\_\_\_ e-mail Address: \_\_\_\_\_

Were you a U.S. citizen or resident alien the entire year?  Yes  No Were you ever a U.S. citizen?  Yes  No

**U.S. Local Street Address:** \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

**Foreign Residence Address:** \_\_\_\_\_

Address Line 2: \_\_\_\_\_

Foreign Country: \_\_\_\_\_ Province/Couny: \_\_\_\_\_ Postal Code: \_\_\_\_\_

Country of Citizenship: \_\_\_\_\_ Country that issued Passport: \_\_\_\_\_

Are you married?  Yes  No If "YES", is your spouse in the U.S.?  Yes  No

**Are you a:** U.S. National  Yes  No Resident of Canada  Yes  No Resident of Mexico  Yes  No Resident of South Korea  Yes  No Resident of India  Yes  No

**Dependent Information**

First Name	Last Name	Date of Birth (mm/dd/yyyy)	ITIN or SSN	Relationship to you (son, daughter, none, etc.)	Months in U.S.	U.S. citizen, U.S. resident alien, U.S. national, or a resident of Canada, Mexico, or South Korea	Did person file joint return?	Did child provide more than 50% of their own support?	Did you provide more than 50% of their support?	Did the person have Gross Income of \$3,800 or more?

What is the date you FIRST entered the United States? \_\_\_\_/\_\_\_\_/\_\_\_\_

**Entry Immigration Status - Check one:**  
 U.S. Immigrant/Permanent Resident  F-1 Student  F-2 Spouse or child of Student  
 H-1 Temporary Employee  \*J-1 Exchange Visitor  J-2 Spouse or child of Exchange Visitor  
 Other: (List) \_\_\_\_\_

**Current Immigration Status - Check one:**  
 U.S. Immigrant/Permanent Resident  F-1 Student  F-2 Spouse or child of Student  
 H-1 Temporary Employee  \*J-1 Exchange Visitor  J-2 Spouse or child of Exchange Visitor  
 Other: (List) \_\_\_\_\_

Have you ever changed your visa type or U.S. immigration status?  Yes  No  
 If "Yes", indicate the date and nature of the change. \_\_\_\_/\_\_\_\_/\_\_\_\_

Enter the type of U.S. visa you held during these years:  
 2006 \_\_\_\_\_ 2007 \_\_\_\_\_ 2008 \_\_\_\_\_ 2009 \_\_\_\_\_ 2010 \_\_\_\_\_ 2011 \_\_\_\_\_

**\*If Immigration status is J-1, what is the subtype? Check one:**  
 01 Student  05 Professor  12 Research Scholar  
 02 Short Term Scholar Other: (List) \_\_\_\_\_

**What is the actual primary activity of the visit? Check one:**

- 01 Studying in a Degree Program      04 Lecturing      07 Conducting Research      10 Clinical Activities  
 02 Studying in a Non-Degree Program      05 Observing      08 Training      11 Temporary Employment  
 03 Teaching      06 Consulting      09 Demonstrating Special Skills      12 Here with Spouse

**Check the years you were present in the United States as a teacher, trainee, or student for any part of the year.**

- 2006     2007     2008     2009     2010     2011

**Were you present in the U.S. as a teacher, trainee or student for any part of more than any 5 calendar years?**  Yes  No

**How many days (including vacations, nonworkdays and partial days) were you present in the U.S. during:**

2010 \_\_\_\_\_ 2011 \_\_\_\_\_ 2012 \_\_\_\_\_

**List the dates you entered and left the United States during 2012:**

Date entered United States mm/dd/yyyy	Date departed United States mm/dd/yyyy	Date entered United States mm/dd/yyyy	Date departed United States mm/dd/yyyy

**Did you file a U.S. income tax return for any year before 2012?**  Yes  No

If "Yes", give latest year \_\_\_\_ / \_\_\_\_ / \_\_\_\_ Form number filed \_\_\_\_\_

**During 2012, did you apply to be a green card holder (lawful permanent resident) of the United States?**  Yes  No

**Do you have an application pending to change your status to lawful permanent resident?**  Yes  No

**1. Are you claiming the benefits of a U.S. income tax treaty with a foreign country?**  Yes  No

If "Yes", enter the appropriate information in the columns below.

(a) Country	(b) Tax Treaty Article	(c) Number of months claimed in prior tax years	(d) Amount of exempt income in current tax year

**2. Were you subject to tax in a foreign country on any of the income shown in 1(d) above?**  Yes  No

**Information about academic institution you attended in 2012**

Name: \_\_\_\_\_ Telephone Number: \_\_\_\_\_

Address: \_\_\_\_\_

Name of the director of your academic or specialized program: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone Number: \_\_\_\_\_

**During 2012 did you receive:**

**Did you have:**

Scholarships or Fellowship Grants	<input type="checkbox"/> Yes <input type="checkbox"/> No	Casualty or Theft Losses	<input type="checkbox"/> Yes <input type="checkbox"/> No
Wages, Salaries or Tips	<input type="checkbox"/> Yes <input type="checkbox"/> No	Student Loan Interest	<input type="checkbox"/> Yes <input type="checkbox"/> No
Interest or Dividend Income	<input type="checkbox"/> Yes <input type="checkbox"/> No	State or Local Income Taxes	<input type="checkbox"/> Yes <input type="checkbox"/> No
Distributions from IRA, Pension or Annuity	<input type="checkbox"/> Yes <input type="checkbox"/> No	Charitable Contributions	<input type="checkbox"/> Yes <input type="checkbox"/> No
Business Income	<input type="checkbox"/> Yes <input type="checkbox"/> No	Moving Expenses	<input type="checkbox"/> Yes <input type="checkbox"/> No
Unemployment Compensation	<input type="checkbox"/> Yes <input type="checkbox"/> No	Business Expenses	<input type="checkbox"/> Yes <input type="checkbox"/> No
Capital gains or losses	<input type="checkbox"/> Yes <input type="checkbox"/> No	Child/Dependent Care Expenses	<input type="checkbox"/> Yes <input type="checkbox"/> No
Any Other Income (gambling, lottery, prizes, awards, rents, royalties, etc.)	<input type="checkbox"/> Yes <input type="checkbox"/> No	IRA Contributions	<input type="checkbox"/> Yes <input type="checkbox"/> No