

NONRESIDENT ALIEN INCOME TAX RETURN GUIDE & TEMPLATE

Form Template for Reference and Preparation

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1. PERSONAL INFORMATION

FIRST NAME AND MIDDLE INITIAL

LAST NAME

PRESENT HOME ADDRESS (NUMBER AND STREET, OR P.O. BOX)

IDENTIFYING NUMBER (SSN OR ITIN)

CITY, TOWN OR POST OFFICE, STATE, AND ZIP CODE

FOREIGN COUNTRY (IF APPLICABLE)

COUNTRY OF CITIZENSHIP

COUNTRY OF NATIONALITY

TAX RESIDENCY COUNTRY

2. FILING STATUS

SINGLE NONRESIDENT ALIEN

MARRIED NONRESIDENT ALIEN

QUALIFYING SURVIVING SPOUSE

3. INCOME EFFECTIVELY CONNECTED WITH U.S. TRADE/BUSINESS (ECI)

Income Source / Type	Amount (USD)
Total wages, salaries, tips, etc. (Attach Form(s) W-2)	_____
Taxable interest	_____
Ordinary dividends	_____
Scholarship and fellowship grants (attach explanation)	_____
Business income or (loss) (Schedule C)	_____
Capital gain or (loss)	_____
Other income	_____

Income Source / Type	Amount (USD)
Total ECI Gross Income (Add lines above)	_____

4. ADJUSTMENTS AND DEDUCTIONS

Adjustment Item	Amount (USD)
Health savings account deduction	_____
Scholarship and fellowship exclusions	_____
Itemized deductions (State and Local Income Taxes, etc.)	_____
Total Adjustments / Deductions	_____
Taxable Income (ECI minus Adjustments)	_____

5. TAX TREATY BENEFITS (CLAIMED UNDER SCHEDULE OI)

Country of Treaty	Treaty Article	Months in U.S.	Exempt Income Amount
_____	_____	_____	_____
_____	_____	_____	_____

6. TAX, PAYMENTS AND REFUNDS

Total Tax liability (calculated based on Taxable Income)	_____
Federal income tax withheld (from W-2, 1042-S, 1099)	_____
Estimated tax payments made	_____
Total Payments (withholding and estimated payments)	_____
Refund Amount (if Total Payments is larger than Tax Liability)	_____
Amount You Owe (if Tax Liability is larger than Total Payments)	_____

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete.

YOUR SIGNATURE

DATE

OCCUPATION IN U.S.