

# DUAL-STATUS ALIEN TAX STATEMENT

Attachment to Form 1040 or Form 1040-NR

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This statement must be attached to your primary U.S. individual income tax return. Identify the period of residency and period of nonresidency during the taxable year.

## I. PERSONAL INFORMATION

First Name & Middle Initial		Last Name	
U.S. SSN or ITIN		Foreign Identification Number	
Current Home Address			
Country of Citizenship		Country of Residence	

## II. RESIDENCY PERIOD INFORMATION

U.S. Resident Period	From: _____ To: _____
U.S. Nonresident Period	From: _____ To: _____
Current Visa Status	
Date of Entry into U.S.	
Date of Departure (if applicable)	

## III. FILING STATUS & ELECTIONS

<input type="checkbox"/> Filing Form 1040 as Resident Return (with Form 1040-NR Statement attached)	
<input type="checkbox"/> Filing Form 1040-NR as Nonresident Return (with Form 1040 Statement attached)	
Joint Return Election	<input type="checkbox"/> Section 6013(g) Election <input type="checkbox"/> Section 6013(h) Election

## IV. INCOME SUMMARY & ALLOCATION

Income Category	Nonresident Period (U.S. Source Only)	Resident Period (Worldwide Source)	Total U.S. Taxable Income
Wages, Salaries, Tips			
Interest Income			
Dividend Income			
Business Income (Sch C)			
Capital Gains / Losses			
Other Income			

## V. TREATY BENEFITS CLAIMED

Treaty Country	Treaty Article	Amount of Income Exempt	Explanation
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***Under penalties of perjury, I declare that I have examined this statement, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete.***

\_\_\_\_\_  
Your Signature

\_\_\_\_\_  
Date