

U.S. DUAL-STATUS ALIEN INCOME TAX RETURN

Statement of Income and Allocation for Part-Year Resident
Tax Year: 20____

PART I: TAXPAYER GENERAL INFORMATION

First Name and Middle Initial

Last Name

Social Security Number (SSN) or ITIN

Country of Citizenship

Current Home Address (Number and Street)

Apt / Suite

City, Town, or Post Office

State / Province

ZIP / Postal Code

PART II: DUAL-STATUS RESIDENCY PERIODS

U.S. Resident Period - From (MM/DD/YYYY)

U.S. Resident Period - To (MM/DD/YYYY)

Nonresident Period - From (MM/DD/YYYY)

Nonresident Period - To (MM/DD/YYYY)

Visa Type/Status during Resident Period

Visa Type/Status during Nonresident Period

PART III: INCOME SOURCE & ALLOCATION

Source of Income	Resident Period (Global Income)	Nonresident Period (U.S. Source Only)	Total Combined
1. Wages, salaries, tips, etc.			
2. Taxable interest			
3. Ordinary dividends			
4. Capital gain or (loss)			
5. Pensions, annuities, and IRA distributions			
6. Business income or (loss)			
7. Other income (specify: _____)			
8. Total Income (Add lines 1 through 7)			

PART IV: ADJUSTMENTS, DEDUCTIONS & TAX SUMMARY

Description	Ref	Amount
Adjustments to Income (from Schedule 1)	9	
Adjusted Gross Income (Subtract line 9 from line 8)	10	

Description	Ref	Amount
Itemized Deductions (allocated to resident period/effectively connected)	11	
Taxable Income (Subtract line 11 from line 10)	12	
Tax on Taxable Income (including Schedule D/other forms)	13	
Tax on Nonresident Period Income Not Effectively Connected (flat rate)	14	
Total Tax Liability (Add lines 13 and 14)	15	
Total Payments (Withholding, Estimated Tax, etc.)	16	
Amount Owed / Refund Due	17	

PART V: SIGNATURES AND DECLARATIONS

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

Preparer's Signature (if other than taxpayer)

Date

PTIN

Document Designation: Dual-Status Statement / Attachment to Form 1040 or Form 1040-NR.