Tax Organizer—Alien (Non-U.S. Citizen)

Name: _____

SSN/ITIN: _____ ☐ To be applied for

Country of Citizenship/Nationality: _____

Country which issued Passport (if different): _____

Address in Country of Permanent Residence: _____

(If different from Mailing Address) _____

Address where Refund Check to be mailed: _____

(If different from Mailing Address) _____

Were you at one time a U.S. citizen? ○ Yes ○ No

Did you relinquish status as a U.S. permanent resident in the current tax year? ○ Yes ○ No

Purpose of visit to U.S.: _____

Type of Entry Visa: _____

Type of Current Visa (if different): _____

Date Visa Type Changed (if applicable): _____

Did you apply for or take other affirmative steps to apply for lawful permanent residence in the U.S.? ○ Yes ○ No

If Yes, explain: _____

If you were a resident of Canada, Mexico, or South Korea, amount spouse contributed toward support of dependents: $ _____

If you were a resident of South Korea, total foreign source income not effectively connected with a U.S. trade or business: $ _____

Last U.S. Return Filed: ☐ N/A Year: _____ Form Filed: _____

Travel Information

Note: Include all information for 2023. Also include information for 2022 and 2021 if not provided to us previously.

Country	Date Arrived	Date Departed	Days Worked		Total Days	
			U.S.	Non-U.S.	U.S.	Non-U.S.
		Total Days	0	0	0	0

IMPORTANT: If this tax year was either your first year in the U.S. or your last year in the U.S., in each income or deduction section of your organizer, please indicate the dates the income or deduction relates to and whether the source is U.S. or non-U.S. If any foreign tax was paid on any item of income, please indicate the amount paid next to the item of income.

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