

AM-PM Business Solutions, LLC

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ITIN Document Preparation Checklist

- Applying for a New ITIN
- Renew an Existing ITIN

HAVE YOU PREVIOUSLY BEEN ISSUED AN ITIN BY THE IRS?

- YES Number: _____
- NO

Reason for Submitting Form W-7

If you check b, c, d, e, f, or g, you must file a US Federal Tax Return with Form W-7 unless you meet one of the exceptions.

- A. Nonresident Alien required to get an ITIN to Claim Tax Treaty Benefits
- B. Nonresident Alien Filing a US Federal Tax Return
- C. US Resident Alien (based on days present in the United States) filing a US Federal Tax Return
- D. Dependent of US Citizen/Resident Alien
- E. Spouse of US Citizen/Resident Alien - Name: _____
SSN: _____
- F. Nonresident Alien Student, Professor or Researcher filing a US Federal Tax Return or claiming an exception
- G. Dependent/Spouse of a nonresident Alien holding a US Visa
- H. Other – Specify _____

NAME:

First Name: _____

Middle Name: _____

Last Name: _____

NAME AT BIRTH IF DIFFERENT:

First Name: _____

Middle Name: _____

Last Name: _____

APPLICANT'S US MAILING ADDRESS:

Street Address: _____

Apt. No: _____

City: _____

State and Zip Code: _____

CONTACT PHONE NUMBER: _____

EMAIL ADDRESS: _____

FOREIGN (NON-US) ADDRESS

Street: _____

City/Country/Country Code: _____

DATE OF BIRTH: _____

COUNTRY OF BIRTH: _____

CITY/STATE OR PROVINCE: _____

GENDER:

- MALE
- FEMALE

COUNTRY OF CITIZENSHIP: _____

FOREIGN TAX ID NUMBER: _____

TYPE OF VISA: _____

VISA NUMBER: _____

VISA EXPIRATION NUMBER: _____

IDENTIFICATION DOCUMENT SUBMITTED:

- PASSPORT
- ID
- USCIS
- OTHER

ISSUED BY: _____

DOCUMENT NUMBER: _____

EXPIRATION DATE: _____

DATE OF ENTRY IN THE US: _____

NAME OF COLLEGE/UNIVERSITY/COMPANY (if applicable)

Name: _____

Address: _____

LENGTH OF STAY: _____