

Information Needed for Preparation of 1040NR by Non-US Individuals

1. Please indicate your marital status, your spouse's name, and the names and ages of any dependents. If your spouse and/or dependents have US Taxpayer Identification Numbers, please provide them.

2. Is this your first US tax return (yes/no)? _____ If no, and HerrickGlobal has *not* prepared the prior year return, please provide copies of the most recent tax return filed, both US federal and state, if applicable.

3. If you had any other US income on which there was no withholding, we will need additional information, with details of sources, amounts, and withholdings.

4. Please indicate whether you have an application for US permanent resident status in process. Yes/No _____

5. Please provide a list of any gifts to US charities, cash or otherwise, during the year.

6. When completing a US non-resident income tax return, there is one page that asks a number of questions about the non-resident's status in the US. In order to complete the necessary information disclosures, we need for you to answer the following questions:

a. Of what country (countries) were you a citizen during 2023? _____

b. Of what country were you a resident during 2023? _____

c. Were you ever a US citizen or permanent resident? _____
(If yes, please provide details on a separate page.)

d. If you entered the US on a Visa, what type of Visa? _____
Visa number: _____

e. Indicate your US immigration status, if any, on December 31, 2023: _____

f. Please provide the number of days you were present in the United States during each of the following three years, *including partial days*:

2021 _____ 2022 _____ 2023 _____

g. **IMPORTANT:** On page 2, please list the date entered and date departed for **EVERY** trip to the US during 2023.

Signature: _____ Date: _____

Current email address: _____

Please print name of taxpayer: _____

Travel Information

6g. Please list the dates of entry and exit into the U.S. Also, please list the purpose of the travel: personal or business.

Purpose of travel to the U.S.	Date of Entry	Date of Exit	Number of days in the U.S.