

Nonresident Alien Intake and Interview Sheet

Last or Family Name **ANDERSSON** First **EMILY** Middle Initial **E**

ITIN or Social Security # **222-00-XXX** Visa # **2001199** Passport # **332667**

Date of Birth: **03 / 06 / 1990** Telephone # **402-555-XXXX** e-mail Address

Were you a U.S. citizen or resident alien the entire year? Yes No Were you ever a U.S. citizen? Yes No

U.S. Local Street Address **162 JULIUS RD**

City **OMAHA** State **NE** Zip Code **68000**

Foreign Residence Address **11 ANY STREET**

Address Line 2 **INNERSTADEN STOCKHOLM**

Foreign Country **SWEDEN** Province/County **STOCKHOLM** Postal Code

Country of Citizenship **SWEDEN** Country that issued Passport **SWEDEN**

Are you married? Yes No If "YES", is your spouse in the U.S.? Yes No
If "YES", is it recognized by the State where you will be filing? Yes No

Are you a U.S. National Yes No Resident of Canada Yes No Resident of Mexico Yes No Resident of South Korea Yes No Resident of India Yes No

Dependent Information

| First Name | Last or Family Name | Date of Birth (mm/dd/yyyy) | ITIN or SSN | Relationship to you (son, daughter, none, etc.) | Number of months lived with you in the U.S. in 2022 | U.S. citizen, U.S. resident alien, U.S. national, or a resident of Canada, Mexico, or South Korea | Did person file joint return? | Did person provide more than 50% of their own support? | Did you provide more than 50% of their support? | Did the person have Gross Income of \$4,400 or more? |
|------------|---------------------|----------------------------|-------------|---|---|---|-------------------------------|--|---|--|
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What is the date you FIRST entered the United States? **12 / 27 / 2020**

Entry Immigration Status - Check one

U.S. Immigrant/Permanent Resident F-1 Student F-2 Spouse or child of Student
 H-1 Temporary Employee *J-1 Exchange Visitor J-2 Spouse or child of Exchange Visitor
Other (list)

Current Immigration Status - Check one

U.S. Immigrant/Permanent Resident F-1 Student F-2 Spouse or child of Student
 H-1 Temporary Employee *J-1 Exchange Visitor J-2 Spouse or child of Exchange Visitor
Other (list)

Have you ever changed your visa type or U.S. immigration status? Yes No

If "Yes", indicate the date and nature of the change. **/ /**

Enter the type of U.S. visa you held during these years

2016 2017 2018 2019 2020 **J-1** 2021 **J-1**

* If Immigration status is J-1, what is the subtype? Check one

01 Student 05 Professor 12 Research Scholar
 02 Short Term Scholar Other (list)

What is the actual primary activity of the visit? Check one

01 Studying in a Degree Program 04 Lecturing 07 Conducting Research 10 Clinical Activities
 02 Studying in a Non-Degree Program 05 Observing 08 Training 11 Temporary Employment
 03 Teaching 06 Consulting 09 Demonstrating Special Skills 12 Here with Spouse

Check the years you were present in the United States as a teacher, trainee, student or as an accompanying spouse or dependent of a person in such status for any part of the year. 2016 2017 2018 2019 2020 2021

Have you ever been present in the U.S. PRIOR to 2016 on a teacher, trainee, student visa, or as their accompanying spouse or dependent? Yes No If so, what years and visa type _____

How many days (including vacations, nonworkdays and partial days) were you present in the U.S. during

2020 5 2021 324 2022 365

List the dates you entered and left the United States during 2022

| Date entered United States mm/dd/yyyy | Date departed United States mm/dd/yyyy | Date entered United States mm/dd/yyyy | Date departed United States mm/dd/yyyy |
|--|---|--|---|
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Did you file a U.S. income tax return for any year before 2022? Yes No

If "Yes", give latest year 4 / 15 / 21 Form number filed 1040-NR

During 2022, did you apply to be a green card holder (lawful permanent resident) of the United States? Yes No

Do you have an application pending to change your status to lawful permanent resident? Yes No

1. Are you claiming the benefits of a U.S. income tax treaty with a foreign country? Yes No

If "Yes", enter the appropriate information in the columns below

| (a) Country | (b) Tax Treaty Article | (c) Number of months claimed in prior tax years | (d) Amount of exempt income in current tax year |
|-------------|------------------------|--|--|
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2. Were you subject to tax in a foreign country on any of the income shown in 1(d) above? Yes No

Information about academic institution you attended in 2022

| | |
|--|-------------------------------|
| Name STATE COLLEGE | Telephone number 402-555-XXXX |
| Address 323 S 49TH AVE, OMAHA, NE 68011 | |
| Name of your academic/specialized program director SUE LEARY | Telephone number 402-555-XXXX |
| Address 323 S 49TH AVE, OMAHA, NE 68011 | |

During 2022 did you receive

Did you have

| | |
|--|--|
| Scholarships or Fellowship Grants <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No | Casualty Losses in a Declared Disaster Area <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No |
| Wages, Salaries or Tips <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No | Student Loan Interest Paid <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No |
| Interest <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No | State or Local Income Taxes <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No |
| Distributions from IRA, Pension or Annuity <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No | U.S. Charitable Contributions <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No |
| State or Local Tax Refunds <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No | Child/Dependent Care Expenses <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No |
| Unemployment Compensation <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No | IRA Contributions <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No |
| Dividend income or capital gains or losses <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No | Any Other Income (<i>gambling, lottery, prizes, awards, self-employment, rents, royalties, virtual currency, etc.</i>) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No |
| Did you or any dependent have health insurance coverage through HealthCare.gov (The Marketplace)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No | |
| If yes, was any Advanced Premium Tax Credit received? (<i>Provide Form 1095-A</i>) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No | |

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The Privacy Act of 1974 requires that when we ask for information we tell you our legal right to ask for the information, why we are asking for it, and how it will be used. We must also tell you what could happen if we do not receive it, and whether your response is voluntary, required to obtain a benefit, or mandatory.

Our legal right to ask for information is 5 U.S.C. 301. We are asking for this information to assist us in contacting you relative to your interest and/or participation in the IRS volunteer income tax preparation and outreach programs. The information you provide may be furnished to others who coordinate activities and staffing at volunteer return preparation sites or outreach activities. The information may also be used to establish effective controls, send correspondence and recognize volunteers. Your response is voluntary. However, if you do not provide the requested information, the IRS may not be able to use your assistance in these programs.

The Paperwork Reduction Act requires that the IRS display an OMB control number on all public information requests. The OMB Control Number for this study is 1545-2075. Also, if you have any comments regarding the time estimates associated with this study or suggestion on making this process simpler, please write to the Internal Revenue Service, Tax Products Coordinating Committee, SE:W:CAR:MP:T:T:SP, 1111 Constitution Ave. NW, Washington, DC 20224.