

# Taxpayer Information

## Personal Information

First name	Initial	Last name	Social Security Number	M/F
_____	_____	_____	_____	_____ <b>TP</b>
_____	_____	_____	_____	_____ <b>SP</b>
Street address _____				
_____				Apt. number _____
City	State	Zip code	County	Foreign Country/Province
_____	_____	_____	_____	_____
	Home	Business	Ext	Fax
Taxpayer Telephone . . .	( ) _____	( ) _____	_____	( ) _____
Spouse Telephone . . .	( ) _____	( ) _____	_____	( ) _____
E-Mail Address _____				
<b>X</b> if you want your tax return mailed to a different address. (Provide details on a continuation sheet.) _____				
<b>X</b> if you authorize taxing authority to discuss return with paid preparer    Federal . . _____    State . . _____				
<b>X</b> if you don't want state tax forms mailed to you next year . . . . . _____				

## Filing Status - Form 1040 - U.S. Citizen or Resident Alien

Indicate **X** for marital status at 12/31 (1040NR filers use the **Taxpayer Information - Nonresident Alien** form):

Single . . . . .	_____	12
Married, filing jointly . . . . .	_____	13
Married, filing separately . . . . .	_____	14
Head of household (Unmarried and providing more than half the cost of a home for a dependent or unmarried child) . . . . .	_____	15
Widow (widower), as of 2006 or later, who maintained a home as the principal place of residence for a dependent child, stepchild, adopted child or foster child . . . . .	_____	16
If nonresident alien spouse:		
Head of household status and rates, spouse exemption not claimed . . . . .	_____	17
Married, filing separately status and rates, spouse exemption claimed . . . . .	_____	18

## Head of Household

Indicate the name of the qualifying child who is not a dependent \_\_\_\_\_ 19

Social security number of qualifying child . . . . . \_\_\_\_\_ 20

## General

### Taxpayer

### Spouse

Occupation . . . . .	_____	_____	21
Date of birth . . . . .	_____	_____	22
Disabilities . . . . .	Blind _____ Deaf _____	Blind _____ Deaf _____	23
	Other _____	Other _____	24
Contribute to Presidential Campaign Fund . . . . .	Yes _____ No _____	Yes _____ No _____	25
Date of Death . . . . .	_____	_____	26

## Information for Direct Deposit of Refund

Routing number _____ (should be 9 digits)	Account type	27
Account number _____ (Attach a voided check)	Refunds will be deposited into your checking account. If you prefer a savings account deposit, please indicate with an X. . . . .	28
		29

# Taxpayer Information - Nonresident Alien

## Miscellaneous Information

Country where you presently live . . . . . \_\_\_\_\_ 1

Country of citizenship or nationality . . . . . \_\_\_\_\_ 2

Address to which refund check is to be mailed

\_\_\_\_\_ 3

\_\_\_\_\_ 4

Address in country of permanent residence

\_\_\_\_\_ 5

\_\_\_\_\_ 6

## Filing Status

Indicate **X** for filing status at 12/31:

Single resident of Canada or Mexico, or a U.S. National . . . . . \_\_\_\_\_ 7

Other single nonresident alien . . . . . \_\_\_\_\_ 8

Married resident of Canada or Mexico, or a U.S. National . . . . . \_\_\_\_\_ 9

Married resident of the Republic of Korea (South) . . . . . \_\_\_\_\_ 10

Other married nonresident alien . . . . . \_\_\_\_\_ 11

Widow(er), as of 2006 or later, with dependent child . . . . . \_\_\_\_\_ 12

Estate or trust . . . . . \_\_\_\_\_ 13

## Preparer Use Only

Change the return type from a U.S. nonresident to U.S. resident return next year . . . . . \_\_\_\_\_ 14

If so, enter the filing status of the U.S. resident return . . . . . \_\_\_\_\_ 15

# Nonresident Alien

## Treaty Exemption Statement

Name of foreign employer \_\_\_\_\_ 1

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## Other Information

Country that issued passport \_\_\_\_\_ 2

Indicate **X** if you were ever a U.S. citizen \_\_\_\_\_ 3

Purpose of visit to U.S. \_\_\_\_\_ 4

\_\_\_\_\_ 5

Indicate type of entry visa \_\_\_\_\_ 6

Indicate type of entry visa (cont'd) \_\_\_\_\_ 7

Indicate current nonimmigrant status & date of change \_\_\_\_\_ 8

Indicate **X** if you abandoned permanent residence as an immigrant in the U.S. this year \_\_\_\_\_ 9

Date of first entry into the U.S. \_\_\_\_\_ 10

Indicate **X** if you are a green card holder \_\_\_\_\_ 11

Indicate total days physically present in U.S. during: 2006 \_\_\_\_\_ 2007 \_\_\_\_\_ 2008 \_\_\_\_\_ 12

If a resident of Canada, Mexico, the Republic of Korea or a U.S. national,

indicate **X** if your spouse contributed to support of dependent children \_\_\_\_\_ 13

Indicate the amount of such support \_\_\_\_\_ 14

Indicate **X** if a U.S. income tax return was filed for any year prior to 2007 \_\_\_\_\_ 15

Indicate: Year of your latest return \_\_\_\_\_ 16

Form number of your latest return \_\_\_\_\_ 17

IRS office to which the return was sent \_\_\_\_\_ 18

\_\_\_\_\_ 19

IRS office to which payments were made \_\_\_\_\_ 20

Indicate **X** if you had a permanent U.S. establishment or fixed base during the year. \_\_\_\_\_ 21

If return is filed to report community income, enter your spouse's name, address, Social Security number, and Internal Revenue Service center where your spouse's return is filed:

\_\_\_\_\_ 22

\_\_\_\_\_ 23

\_\_\_\_\_ 24

\_\_\_\_\_ 25

Indicate **X** if you had applied for lawful permanent resident status (green card) in the U.S. \_\_\_\_\_ 26

If "Yes," explain \_\_\_\_\_ 27

\_\_\_\_\_ 28

If you are married to a nonresident alien, enter **X** if a joint election was made in a prior year \_\_\_\_\_ 29

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