

**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 2024? \_\_\_\_\_

b. Of what country were you a resident during 2024? \_\_\_\_\_

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, 2024: \_\_\_\_\_

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

2022 \_\_\_\_\_ 2023 \_\_\_\_\_ 2024 \_\_\_\_\_

g. **IMPORTANT:** On page 2, please list the date entered and date departed for **EVERY** trip to the US during 2024.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Current email address: \_\_\_\_\_

Please print name of taxpayer: \_\_\_\_\_

