Your Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Daytime Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Evening Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Skype ID: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Please complete this Questionnaire in addition to the General Questionnaire since you indicated that you were neither US citizen nor Permanent Resident. You may still be considered as “Resident” for tax purpose even though you are neither US citizen nor Permanent Resident.**

**The questions here are intended to provide a general “big picture” of your situation and therefore are not exhaustive. Depending on your answers and situation, follow-up questions may be necessary.**

**Your answers here will help clarify your tax status. Thank you!**

**General Information**

|  |  |  |  |
| --- | --- | --- | --- |
|  | Primary Taxpayer | Spouse | PREPARER’SNOTES |
| Primary Taxpayer’s Name |  | N/A |  |
| Country of Citizenship |  |  |  |
| Country of Residence, if different from Citizenship. Please list all if you have more than one. |  |  |  |
| Type of visa |  |  |  |
| Date you entered U.S. with the above visa type |  |  |  |
| Current visa status and date of change, if any |  |  |  |
| Which country issued your passport? |  |  |  |
| Passport Number |  |  |  |
| How many days were you physically present in U.S. in 2014, 2015 and 2016 respectively? | 2014 –  2015 –  2016 – | 2014 –  2015 –  2016 – |  |
| Do you maintain a tax home in a foreign country during the year and/or have a closer connection to a foreign country other than USA? | Yes  No | Yes  No |  |
| Did you take any step to change your status to that of permanent resident? | Yes  No | Yes  No |  |
| Were you once a US citizen who renounced the US citizenship or Lawfully Admitted Permanent Resident who ended US permanent residency? | Yes  No | Yes  No |  |

List all dates you entered and left the United States during 2016

|  |  |
| --- | --- |
| Date entered US  (mm/dd/yy) | Date departed US  (mm/dd/yy) |
|  |  |
|  |  |
|  |  |
|  |  |

Complete this section only if you were **EMPLOYEE/ WORKER** (i.e. Personal Service Income)

|  |  |  |  |
| --- | --- | --- | --- |
|  | You | Spouse | PREPARER’SNOTES |
| Was your salary/ wage paid by, or on behalf of, an employer or company that is not a US resident? | Yes  No | Yes  No |  |
| Did your employer or company deduct your salary/ wage as an expense when figuring out its taxable income? | Yes  No | Yes  No |  |
| Was any of your pay a result of your service as Board of Director of a US corporation? | Yes  No | Yes  No |  |
| Were you a member of the regular complement of a ship or aircraft operated in international traffic? | Yes  No | Yes  No |  |

Complete this section only if you were **INDEPENDENT CONTRACTOR/ SELF-EMPLOYED**

|  |  |  |  |
| --- | --- | --- | --- |
|  | You | Spouse | PREPARER’SNOTES |
| Did you have a fixed base regularly available in the United States for performing the service? | Yes  No | Yes  No |  |

Complete this section only if you were **PROFESSOR, TEACHERS and RESEARCHERS**

|  |  |  |  |
| --- | --- | --- | --- |
|  | You | Spouse | PREPARER’SNOTES |
| If you had income from research, was your research carried on mainly for the private benefit of any person rather than in the public interest? | Yes  No | Yes  No |  |
| Was your temporary presence in the United States at the invitation of the US Government or an educational or scientific research institution in the United States? | Yes  No | Yes  No |  |

Complete this section only if you were **FOREIGN STUDENT and APPRENTICES**

|  |  |  |  |
| --- | --- | --- | --- |
|  | You | Spouse | PREPARER’SNOTES |
| Name, address and phone number of the school you attended during 2016. |  |  |  |
| Name, address and phone number of the director that oversees your academic program |  |  |  |
| Visa type in U.S. for each year (F, J, M or Q) | 2011 –  2012 –  2013 –  2014 –  2015 –  2016 – | 2011 –  2012 –  2013 –  2014 –  2015 –  2016 – |  |
| Did you take any step to change your status to that of permanent resident? | Yes  No | Yes  No |  |
| Have you engaged in activities that are prohibited by U.S. immigration laws and could result in the loss of your visa status? | Yes  No | Yes  No |  |
| Was any of your income from off-campus job(s) that was/ were not authorized by USCIS? | Yes  No | Yes  No |  |
| Did you receive scholarship and fellowship from U.S. source? | Yes  No  If Yes, how much of scholarship and fellowship did you use to pay for qualified education expense (i.e. tuition, course-required books, supplies and equipment)? | Yes  No  If Yes, how much of scholarship and fellowship did you use to pay for qualified education expense (i.e. tuition, course-required books, supplies and equipment)? |  |
| If you received scholarship and fellowship from U.S. source, did the term of the grant require you to spend it on purposes other than qualified education expense, or specify that the grant cannot be used to pay for tuition or course-related expense? | Yes  No | Yes  No |  |
| If you received scholarship and fellowship from U.S. source, did any portion represent payment for teaching, research, or other services? | Yes  No  If Yes, how much is represented for teaching, research or other services? | Yes  No  If Yes, how much is represented for teaching, research or other services? |  |
| Your country of residence immediately before visiting United States |  |  |  |
| If you were a student, were you a full-time student? | Yes  No | Yes  No |  |

Complete this section only if your WAGES and **PENSIONS PAID BY A FOREIGN GOVERNMENT**

|  |  |  |  |
| --- | --- | --- | --- |
|  | You | Spouse | PREPARER’SNOTES |
| Did you perform services similar to those performed by U.S. government employees in your country, and your country grants an equivalent exemption? | Yes  No | Yes  No |  |
| Which country did you work for? |  |  |  |
| If applicable, which international organization in the United States did you work for? |  |  |  |
| Were your wages and/or pension paid by your country’s public fund? | Yes  No | Yes  No |  |
| Did you not become a US citizen only to perform the services? | Yes  No | Yes  No |  |

**Please use the space below to provide any information, if any, that you believe is significant but I haven’t asked you. Use additional paper if necessary.**

|  |
| --- |
|  |

\*\*\* END \*\*\*

Please return this Questionnaire along with the General Questionnaire.