**University of Notre Dame International Tax Assistance Program – 2021 (2020 Tax year) Intake Form (adapted from IRS Form 13614-NR)**

Updated: 02/04/2021

Name (please print): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Email address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date of birth: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Local Street Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

City, State, Zip Code: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Phone number \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Foreign Residence Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Country of citizenship *(Please list all):* \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Country that issued your passport *(Please list all):* \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Country of Residence (Country where you last resided for at least one year immediately before you came to the United States): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Are you married? Yes \_\_\_\_ No \_\_\_\_ If “yes,” is your spouse in the U.S.? \_\_\_\_\_\_\_\_\_

Is your spouse a U.S. citizen? \_\_\_\_\_\_\_ Spouse’s Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Are you a resident of: Mexico \_\_\_\_\_ India \_\_\_\_\_ South Korea \_\_\_\_\_ Canada \_\_\_\_\_

Dependent information:

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| First and last name | Date of birth | Relationship  (daughter, son, etc.) | Months lived with you in the US | Place of birth | Did you provide more than 50% of support |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

Date you first entered the United States on either an F or J Visa: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Visa status when you first entered the U.S.: F-1 \_\_\_\_\_\_\_ J-1 \_\_\_\_\_\_\_ Other \_\_\_\_\_\_\_

Current Visa status: F-1 \_\_\_\_\_\_\_ J-1 \_\_\_\_\_\_\_ Other \_\_\_\_\_\_\_

Date of change (if applicable): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

If Immigration Status is J-1, what is the sub-type?

\_\_\_\_\_ Student (01) \_\_\_\_\_ Professor or Teacher (05)

\_\_\_\_\_ Short-Term Scholar (02) \_\_\_\_\_ Research Scholar (12)

Enter the type of U.S. visa you had during each of these years:

2015 \_\_\_\_2016 \_\_\_\_2017 \_\_\_\_2018 \_\_\_\_2019 \_\_\_\_2020 \_\_\_\_

What is the actual, primary activity of your visit?

\_\_\_\_\_ Studying in a degree program (01) \_\_\_\_\_ Lecturing (04)

\_\_\_\_\_ Studying in a non-degree program (02) \_\_\_\_\_ Conducting Research (07)

\_\_\_\_\_ Teaching (03) \_\_\_\_\_ Here with spouse (12)

Other \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Students only: Were you present in the U.S. as a teacher, trainee, or student for any part of more than any five calendar years? Yes \_\_\_\_ No \_\_\_\_

J-1 Research Scholars only: Were you present in the U.S. as a teacher, trainee, or student for any part of 2 of the 6 prior calendar years? (2013-2018) Yes \_\_\_\_ No \_\_\_\_

How many days were you present in the U.S. during the following years?

Note: We are looking for exact numbers here, NOT ESTIMATES. If you need help, Google “Date Duration Calculator”

2018 \_\_\_\_ 2019 \_\_\_\_ 2020 \_\_\_\_

List the dates you entered and left the U.S. during 2020:

Entered Left Entered Left Entered Left

\_\_\_\_\_\_\_ \_\_\_\_\_\_\_ \_\_\_\_\_\_\_ \_\_\_\_\_\_\_ \_\_\_\_\_\_\_ \_\_\_\_\_\_\_

\_\_\_\_\_\_\_ \_\_\_\_\_\_\_ \_\_\_\_\_\_\_ \_\_\_\_\_\_\_ \_\_\_\_\_\_\_ \_\_\_\_\_\_\_

Did you file a U.S. Federal Income Tax Return for any previous year?

Yes \_\_\_\_ No \_\_\_\_ If “Yes,” latest year and form number filed \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

If you did file U.S. tax returns last year, did we prepare them Yes \_\_\_\_\_ No \_\_\_\_\_

During 2020, did you apply to be a lawful, permanent resident of the U.S. (Green Card holder)? Yes \_\_\_\_ No \_\_\_\_

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

Are you claiming the benefits of a U.S. income tax treaty with a foreign country?

Yes \_\_\_\_ No \_\_\_\_ Don’t know \_\_\_\_ Country \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Were you subject to tax in a foreign country on the income claimed above?

Yes \_\_\_\_ No \_\_\_\_

Your College, School, or other organization within the University of Notre Dame:

Architecture \_\_\_\_ Business Administration \_\_\_\_ Law \_\_\_\_

Arts & Letters \_\_\_\_ Keough, Kroc, or Nanovic \_\_\_\_

Engineering \_\_\_\_ Science\_\_\_\_

First Year Undergraduate \_\_\_\_ Other \_\_\_\_

During 2020, did you receive or pay any of the following:

\_\_\_\_ Wages \_\_\_\_ Casualty or Theft Losses

\_\_\_\_ Scholarships or Fellowship grants \_\_\_\_ Student Loan Interest

\_\_\_\_ Interest or Dividend Income \_\_\_\_ State or Local Income Taxes

\_\_\_\_ Self-employment Income \_\_\_\_ U.S. Charitable Contributions

\_\_\_\_ Business Expenses \_\_\_\_ Investment Income

\_\_\_\_ Child/Dependent Care Expenses \_\_\_\_ Any other income

Did you or any of your family members purchase health insurance through an Affordable Care Act (ACA) Marketplace? Yes \_\_\_\_\_ No \_\_\_\_\_ Don’t know \_\_\_\_\_

Note: Most Notre Dame Students and employees have health insurance through the University.

**State of Indiana Information Request**

Did you have income from any state other than Indiana?

Yes \_\_\_\_ No \_\_\_\_ If “Yes,” which state(s) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Except for temporary absences such as winter break, were you living in Indiana on January 1, 2020? Yes \_\_\_\_ No \_\_\_\_

Did you receive a state tax refund during 2020 associated with a previous tax year.

Yes \_\_\_\_ No \_\_\_\_ Amount \_\_\_\_\_\_\_\_

Did you rent from a private landlord in Indiana during 2020? (This does not include the University of Notre Dame.) Yes \_\_\_\_ No \_\_\_\_

If “Yes,” number of mos. rented during 2020 \_\_\_\_\_\_ Total rent paid during 2020 \_\_\_\_\_\_

Name and address of landlord \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Did you donate money to an Indiana college or university during 2020? (Paying tuition doesn’t count)

Yes \_\_\_\_ No \_\_\_