

ITIN Application — What I Need From You

To prepare your Form W-7 and obtain your ITIN, please provide the following.

1 · APPLICANT INFORMATION

- Full legal name (and birth name, if different)
- Date, city & country of birth
- Country(ies) of citizenship
- U.S. mailing address + foreign (home-country) address
- U.S. visa type & number – if any
- Foreign tax ID number – if any
- Reason for ITIN (filing a U.S. return / spouse / dependent / other)

2 · IDENTIFICATION (IDENTITY + FOREIGN STATUS)

- Passport** – preferred; it's the only stand-alone document, **OR**
- Two documents** (at least one with a photo): national ID, driver's license, U.S. visa, USCIS ID, birth certificate, etc.

As a **Certifying Acceptance Agent (CAA)**, I verify your original documents in person – **you do NOT mail your passport to the IRS.**

3 · BASIS FOR THE APPLICATION (ONE OF THESE)

- The **U.S. tax return** the ITIN is needed for – most common, **OR**
- A document supporting an **Exception** (e.g., 1099 / withholding, mortgage interest, bank-account opening, gambling winnings)

Dependents – also need

- Passport with U.S. entry date** – or supporting docs (school records < 18, medical records < 6) + visa
- The tax return that claims the dependent