Remedy Tax Services

ITIN application checklist

What to bring to your ITIN appointment. As an IRS Certifying Acceptance Agent, we review your original documents in the office and certify them, so in most cases you keep them.

Who is applying

- [ ] Myself
- [ ] My spouse
- [ ] My child or other dependent

Name exactly as on the passport

Date of birth

Country of citizenship

Date of entry to the United States

Is this a renewal?

Foreign address

Why the number is needed

- [ ] I must file a U.S. tax return
- [ ] I am a dependent on someone's return
- [ ] I am claiming a tax treaty benefit
- [ ] I am the spouse of a U.S. citizen or resident
- [ ] I am a student, professor or researcher filing a return
- [ ] I am selling or own U.S. property

Proof of identity and foreign status

A valid passport is enough by itself. Without one, bring two documents from the list below. At least one must have a photo, and all must be current originals or copies certified by the agency that issued them.

- [ ] Passport
- [ ] U.S. driver's license
- [ ] U.S. state identification card
- [ ] Visa issued by the U.S. Department of State
- [ ] Foreign voter registration card
- [ ] Medical records (dependents under 6 only)
- [ ] National identity card (name, photo, address, date of birth)
- [ ] Foreign driver's license
- [ ] Civil birth certificate
- [ ] USCIS photo identification
- [ ] U.S. or foreign military identification card
- [ ] School records (dependents under 18 who are students)

Also bring

- [ ] The federal tax return the ITIN is for, with W-2s and 1099s
- [ ] Any earlier ITIN letter from the IRS (Notice CP565)
- [ ] For a dependent: proof the child lives in the United States, such as school or medical records
- [ ] For a spouse or dependent: the main taxpayer's identification

What happens next

1. We complete Form W-7 with you and certify your documents. 2. The application goes to the IRS with your tax return. 3. The IRS mails your ITIN, usually within several weeks; longer from January to April. 4. For some dependent documents the IRS still requires originals. We tell you which before you apply.

An ITIN is for federal tax use only. It does not authorize work in the United States or change immigration status. It expires if it is not used on a federal return for three tax years in a row.