

## Information for ITIN Applicants

### What To Bring To Your Appointment

- Passport with a visa OR both driver's license/state ID and birth certificate
- If the applicant is a child, then we need either doctor's records or school records indicating that the child lived in the USA during the tax year.
- Completed Form W-7 (google "form w-7" or go here <https://www.irs.gov/pub/irs-pdf/fw7.pdf>)
- Copy of a completed tax return for this year OR any tax documents we need to prepare your return (W-2s, 1099s, interest statements, etc.)

### Process

- Acceptance agent reviews your W-7 and makes copies to be included with the tax return
- Acceptance agent reviews your prepared tax return OR if no tax return, agent prepares your tax return
- Applicant signs the documents and the acceptance agent issues a certification of authenticity
- Applicant mails documents in a Priority Mail envelope to the IRS, noting the tracking number and mailing date
- IRS receives documents, reviews them, and issues an ITIN which is then processed with the tax return. **This process can take the IRS over six months, delaying your tax refund.**
- If you move, be sure to update your address with the IRS using form 8822

### Our Fees

- \$100 for ITIN application
- Additional \$75 per additional ITIN
- Additional \$175+ for tax return preparation (based on the complexity of the tax return) if we prepare the return

### Additional Information

- Once the IRS receives the ITIN application we have no further obligations. However, if you receive a letter from the IRS we may be able to help resolve issues.
- ITINs are issued by the IRS for furnishing a federal ID # to required institutions
- ITINs must be renewed every 3 years
- An ITIN does NOT:
  - Authorize work in the US
  - Provide eligibility for social security benefits
  - Qualify a dependent for Earned Income Tax Credit