Individual Taxpayer Identification Number (ITIN) Instructions for Claiming or Not Claiming a Tax Treaty

Form W-7 Instructions
Apply for an Individual Tax Identification Number (ITIN) by completing the form W-7 in the following circumstances:

- You are not eligible for a Social Security Number (SSN), or
- You are applying for a tax treaty exemption, or
- You are required to file a United States tax return, or are filing a United States tax return only to claim a refund.

Part I – Reason You Are Submitting Form W-7
1. Select “Applying for New ITIN”
2. Select “f” Nonresident alien required to obtain ITIN to claim tax treaty benefit
3. Select “h” Other.

Form W-7 Screen Shot of Part I:

Part II – Personal Information
1. Enter your name as it appears on your Passport
2. Enter your U.S. mailing address
3. Enter your foreign address
4. Enter your Date of Birth, Country of Birth and City of Birth
5. Select your Gender
6. Enter Country and Visa Information
   a. Enter your Country of Citizenship
   b. Leave Blank
   c. Enter your Visa Type, Visa Number and Visa Expiration Date
   d. Select an Identification Type.
      i. Enter the country of issuance
      ii. Enter the identification number
      iii. Enter the expiration date of the identification
      iv. Enter the date of entry in the United States
   e. Enter Yes/No
   f. Leave Blank for new ITIN applicants
   g. Enter Princeton University, Princeton NJ and your length of stay in the U.S.

Part III – Sign Here Section
7. Leave Blank
Form W-8BEN Certificate of Foreign Status of Beneficial Owner for United States Tax Withholding Instruction

Submit form W-8BEN if all of the following are true:

- You are receiving Fellowship/Scholarship income
- You are from a treaty country or you are not from a treaty country
- You are applying for an ITIN

**Part I - Identification of Beneficial Owner**

1. Enter your name as appears on your passport
2. Enter your country of citizenship
3. Enter your foreign address
4. Enter your U.S. mailing address
5. Leave Blank
6. Leave Blank
7. Leave Blank
8. Enter your date of birth

**Part II – Claim of Tax Treaty Benefits**

9. Enter your country of tax resident *(country must match the information in Part I line 3)*
10. Enter the Treaty Article Number for Treaty, 0% for Rate of Withholding and Scholarship/Fellowship for Income Type
   - The Treaty Article Number can be found on the Treaty Table

Form W-8BEN Screen Shot of Part II:

Part III – Certification

11. Sign Here Section: Leave Signature and Date Blank
12. Enter your Name as it appears on line 1
13. Capacity in which acting is “Self”