

**W-7 QUESTIONNAIRE**

(FOR INTERNAL USE ONLY BY ABITOS, CPAs AND ADVISORS,  
FORMERLY KNOWN AS THE BRUNTON, STRACHAN & KHAN CPA FIRM)

1. Name \_\_\_\_\_  
(First) (Middle) (Last)
2. Have you ever been issued a U.S. Taxpayer Identification Number? Yes / No \_\_\_\_\_  
If "Yes": **a)** If it is a U.S. Social Security Number, list the number here \_\_\_\_\_ and do not complete the remainder of this form.  
**b)** If it is a U.S. Taxpayer Identification Number (ITIN), list the number here \_\_\_\_\_, and when it was issued \_\_\_\_\_.
3. Is the above name your birth name? Yes / No \_\_\_\_\_. If the answer is "No", please complete line 4.
4. Birth name (If applicable) \_\_\_\_\_  
(First) (Middle) (Last)
5. Cell: \_\_\_\_\_ Office: \_\_\_\_\_ Home: \_\_\_\_\_
6. Fax: \_\_\_\_\_ Email: \_\_\_\_\_
7. Mailing Address \_\_\_\_\_
8. Non-U.S. address \_\_\_\_\_
9. Date of birth \_\_\_\_\_ City & State (or Province), and Country of birth \_\_\_\_\_  
(month, day, year)
10. Country(ies) of citizenship \_\_\_\_\_
11. Tax ID number in country of residence (eg. Social Insurance Number) \_\_\_\_\_
12. Country issuing your passport \_\_\_\_\_ Expiration Date \_\_\_\_\_ Passport number \_\_\_\_\_
13. Date you first entered the United States in the current year (i.e. tax year for which the return is being filed) \_\_\_\_\_  
(month, day, year)
14. Do you have a U.S. Immigration visa? Yes / No \_\_\_\_\_  
Type of U.S. immigration visa (e.g. B-1, E-2, H-1B, F, etc.) \_\_\_\_\_  
US immigration visa # \_\_\_\_\_ Expiration Date \_\_\_\_\_  
(month, day, year)
15. Are you a student at a College/University/Company? Yes / No \_\_\_\_\_  
Name of school \_\_\_\_\_ City and state \_\_\_\_\_  
Length of stay \_\_\_\_\_
- Signed \_\_\_\_\_ Date \_\_\_\_\_  
(month, day, year)

***If providing a certified copy of your passport (certified by the issuing agency), please obtain two certified copies and include one certified copy with this organizer. The second copy should be retained by you as a backup.***

PLEASE RETURN TO: ABITOS, CPAs AND ADVISORS, FORMERLY  
KNOWN AS THE BRUNTON, STRACHAN & KHAN CPA FIRM  
327 PLAZA REAL, STE 235, BOCA RATON, FL 33432

Tel: (561) 241-9991 Fax: (561) 241-6332 Email: [tax@taxintl.cpa](mailto:tax@taxintl.cpa) Website: [www.taxintl.cpa](http://www.taxintl.cpa)

**Please include the US \$750 preparation fee payable to "AbitOs, PLLC" with this organizer.**

If you wish, retainers can be paid online with a credit card or eCheck. Please go to our website [www.taxintl.cpa](http://www.taxintl.cpa) and scroll down to "Make Payment" on the lower right side or call our office to make a credit card payment over the phone.

**ABITOS, CPAs AND ADVISORS – INTAKE SHEET FOR ITIN APPLICATION**

Client Name: \_\_\_\_\_

A person that is ineligible for a U.S. Social Security number and is required to apply for an Individual Taxpayer Identification Number (ITIN) for U.S. tax filing purposes must provide the following:

- 1) Completed W-7 organizer
- 2) Documentation to confirm identity \_\_\_\_\_ Original documents  
\_\_\_\_\_ Certified copy of documents
- 3) Interview \_\_\_\_\_ In person  
\_\_\_\_\_ Electronic (Zoom, FaceTime, or Teams)
- 4) Documentation substantiating the need for an ITIN  
\_\_\_\_\_ Tax Form \_\_\_\_\_ prepared by our firm  
\_\_\_\_\_ Tax Form \_\_\_\_\_ prepared by another firm  
\_\_\_\_\_ Other \_\_\_\_\_

The ITIN application along with all supporting documentation needs to be mailed to the IRS within 5 business days of completion. Once the IRS has processed the application they will issue an ITIN on a C.P. 565 notice and mail it to the applicant and the Certifying Acceptance Agent. The notice will take 12 – 16 weeks to receive. If you have any questions during this application process, please contact Kelly Strachan, EA, Alan Brador, EA, or Talha Khan at 561-241-9991.

Please be advised of the following:

- 1) The ITIN cannot be used to claim the earned income tax credit under section 321 of the Internal Revenue Code;
- 2) The assignment of an ITIN to an applicant does not change the applicant's immigration status or entitle the applicant to legal employment in the United States;
- 3) The ITIN does not take the place of an SSN or qualify the applicant for Social Security benefits;
- 4) The applicant may be eligible for an SSN and the circumstances under which this may be the case;
- 5) If the applicant becomes eligible for an SSN at a later date, the ITIN can no longer be used and the applicant must apply for an SSN from the Social Security Administration;
- 6) The Responsible Party must fully explain the application process to the applicant, the information required by the form and instructions, the role of the CAA in the process, the extent to which the IRS may communicate information regarding the applicant to the CAA, the fact that the form is signed under penalties of perjury, and the consequences of making false statements or providing incorrect or false documentation.

I attest, under penalties of perjury, the above was explained to me at the time of my ITIN application.

\_\_\_\_\_  
Applicant\_\_\_\_\_  
Date\_\_\_\_\_  
Responsible Party\_\_\_\_\_  
Date