

DUAL STATUS Example

Personal Info

- Taxpayer name – ABC D Jack
- Dob – Jul 05, 1983
- Country of residence on Dec 31, 2011 - USA
- SSN – 199-99-9999
- Address - 1 South Drive, Cranberry TWP PA 16066
- Citizenship – UK
- Assignment in US – April 17, 2011 – 226 days in 2011
- Taxpayer has never been in US before
- Visa type – L-1
- Spouse – Sim Jack
- DOB – Oct 01, 1985
- Spouse SSN – 800-00-0000
- Spousal occupation – Homemaker
- No trust filing
- FBAR filing? – Yes – UK/Spain
- Interest from Barclays – \$2,383 and \$643
- Entry and exits

- 01/01/2011 01/02/2011
- 01/08/2011 01/09/2011
- 01/15/2011 01/16/2011
- 01/22/2011 01/23/2011
- 01/29/2011 01/30/2011
- 04/17/2011 05/12/2011
- 05/16/2011 05/19/2011
- 05/30/2011 06/10/2011
- 06/20/2011 06/24/2011
- 06/27/2011 07/14/2011
- 07/23/2011 07/23/2011
- 08/01/2011 09/02/2011
- 09/04/2011 11/24/2011
- 11/27/2011 12/31/2011

W2 details

Employer Name: XX US Services Inc

Box 1: \$556,255

Box 2: \$172,584

Box 3:

Box 4:

Box 5:

Box 6:

Box 14:

Box 15: PA

Box 16: \$556,255

Box 17: \$17,077

Box 18: \$556,255

Box 19: \$5,563

Box 20: Marshall EIT