

ITIN Application & Renewal Checklist

Identification documents, tax records and other information commonly needed for an ITIN application or renewal.

Use this checklist when applying for a new ITIN or renewing an existing one.

APPLICANT INFORMATION

- ☐ Full legal name
- ☐ Mailing address
- ☐ Foreign address, if applicable
- ☐ Date and country of birth
- ☐ Country of citizenship
- ☐ Foreign tax identification number, if applicable
- ☐ Type of U.S. visa, if applicable
- ☐ Date of entry into the United States, if applicable

IDENTIFICATION DOCUMENTS

If a passport is not available, additional identification documents may be required. Documents must meet current IRS identification and certification requirements.

- ☐ Valid passport

TAX DOCUMENTS

- ☐ Federal income tax return requiring the ITIN
- ☐ Forms W-2
- ☐ Forms 1099
- ☐ Income records
- ☐ Dependent documentation, when applicable
- ☐ Prior ITIN letter, for renewals
- ☐ Prior-year tax return, if available

DEPENDENTS (IF APPLYING FOR ONE)

Additional documentation may be required to establish identity, foreign status and residency.

- ☐ Passport
- ☐ Birth certificate
- ☐ School records
- ☐ Medical records
- ☐ Residency records

RENEWAL APPLICANTS

- ☐ Existing ITIN number
- ☐ IRS ITIN assignment letter, if available
- ☐ Reason for renewal
- ☐ Tax return or filing requirement supporting the renewal

Important: Upload documents through the secure ServiAmigo client portal. Do not send Social Security numbers, identification documents, tax forms or bank information through regular email, text message or WhatsApp.

