

**NORTHWESTERN UNIVERSITY  
ALIEN TAX STATUS FOR GYM SUBSIDY SCHOLARSHIP**

Instructions: **Complete the Alien Tax Status Form and W8-BEN Part I in their entirety.**

**Leaving any fields blank in the W8-BEN will result in a DELAY in your gym membership subsidy.**

**Make sure to include BOTH your U.S. and foreign address in Part I of the W8-BEN.**

**You MUST complete Part B and submit a copy of your passport, visa, I-94, and immigration document (I-20 for F-1, DS- 2019 for J-1, or I-797 for H-1B). Otherwise, your request will be DELAYED.**

**Part A (Demographic)**

Name:	Student or Employee ID:
U.S. Social Security Number (SSN) or ITIN, if applicable:	Country of Citizenship/Country Issuing Passport:
Country of Tax Residence:	Email:

Current Immigration status (i.e. F-1, J-1, H-1B, work permit):	Date you entered The U.S. in that status:
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**Part B (Residency Status)**

**MUST LIST ALL VISA/IMMIGRATION ACTIVITY IN THE LAST 3 CALENDAR YEARS AND ALL F, M, J, OR Q VISITS SINCE 1985. Use an additional sheet of paper if necessary.**

Date or Entry	Date of Exit	Visa/Immigration Status	J-1 subtype (if applicable)	Primary Activity	Have you taken treaty benefits on this status?

**Part C (Treaty Benefits)**

	Yes	No
1- If your scholarship is covered by a treaty agreement between the United States and your home country, and you have a U.S. issues tax ID, do you wish to claim exemption from United States and Illinois tax based on the treaty agreement?	<input type="checkbox"/>	<input type="checkbox"/>

**I hereby certify under the penalties of perjury that all of the above information is true and correct. I understand that I must submit a new Alien Tax Status form if my status changes from that indicated on this form and I am still receiving the gym membership subsidy.**

Signature of Alien	Date
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Certificate of Foreign Status of Beneficial Owner for United States Tax Withholding and Reporting (Individuals)

(Rev. February 2014)

► For use by individuals. Entities must use Form W-8BEN-E.

OMB No. 1545-1621

Department of the Treasury Internal Revenue Service

► Information about Form W-8BEN and its separate instructions is at www.irs.gov/formw8ben. ► Give this form to the withholding agent or payer. Do not send to the IRS.

Do NOT use this form if:

Instead, use Form:

- You are NOT an individual . . . . . W-8BEN-E
• You are a U.S. citizen or other U.S. person, including a resident alien individual . . . . . W-9
• You are a beneficial owner claiming that income is effectively connected with the conduct of trade or business within the U.S. (other than personal services) . . . . . W-8ECI
• You are a beneficial owner who is receiving compensation for personal services performed in the United States . . . . . 8233 or W-4
• A person acting as an intermediary . . . . . W-8IMY

Part I Identification of Beneficial Owner (see instructions)

1 Name of individual who is the beneficial owner 2 Country of citizenship
3 Permanent residence address (street, apt. or suite no., or rural route). Do not use a P.O. box or in-care-of address.
City or town, state or province. Include postal code where appropriate. Country
4 Mailing address (if different from above)
City or town, state or province. Include postal code where appropriate. Country
5 U.S. taxpayer identification number (SSN or ITIN), if required (see instructions) 6 Foreign tax identifying number (see instructions)
7 Reference number(s) (see instructions) 8 Date of birth (MM-DD-YYYY) (see instructions)

Part II Claim of Tax Treaty Benefits (for chapter 3 purposes only) (see instructions)

9 I certify that the beneficial owner is a resident of \_\_\_\_\_ within the meaning of the income tax treaty between the United States and that country.
10 Special rates and conditions (if applicable—see instructions): The beneficial owner is claiming the provisions of Article \_\_\_\_\_ of the treaty identified on line 9 above to claim a \_\_\_\_\_ % rate of withholding on (specify type of income): \_\_\_\_\_
Explain the reasons the beneficial owner meets the terms of the treaty article: \_\_\_\_\_

Part III Certification

Under penalties of perjury, I declare that I have examined the information on this form and to the best of my knowledge and belief it is true, correct, and complete. I further certify under penalties of perjury that:

- I am the individual that is the beneficial owner (or am authorized to sign for the individual that is the beneficial owner) of all the income to which this form relates or am using this form to document myself as an individual that is an owner or account holder of a foreign financial institution,
• The person named on line 1 of this form is not a U.S. person,
• The income to which this form relates is:
(a) not effectively connected with the conduct of a trade or business in the United States,
(b) effectively connected but is not subject to tax under an applicable income tax treaty, or
(c) the partner's share of a partnership's effectively connected income,
• The person named on line 1 of this form is a resident of the treaty country listed on line 9 of the form (if any) within the meaning of the income tax treaty between the United States and that country, and
• For broker transactions or barter exchanges, the beneficial owner is an exempt foreign person as defined in the instructions.

Furthermore, I authorize this form to be provided to any withholding agent that has control, receipt, or custody of the income of which I am the beneficial owner or any withholding agent that can disburse or make payments of the income of which I am the beneficial owner. I agree that I will submit a new form within 30 days if any certification made on this form becomes incorrect.

Sign Here

Signature of beneficial owner (or individual authorized to sign for beneficial owner) Date (MM-DD-YYYY)

Print name of signer

Capacity in which acting (if form is not signed by beneficial owner)