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# INTERNATIONAL TAX NAVIGATOR<sup>®</sup>



THOMSON REUTERS<sup>®</sup>



# SIMPLIFY YOUR NONRESIDENT ALIEN TAX COMPLIANCE PROCESS

International Tax Navigator from Thomson Reuters is a powerful software solution for nonresident alien (NRA) tax compliance and income tax treaty analysis. It examines complex bodies of U.S. tax law and procedure and provides up-to-date analyses, as well as completed withholding certificates and reporting forms 1042 and 1042-S.

This proven, cost-effective solution will help your company or institution easily take the guesswork out of a complicated process. With International Tax Navigator, you can:

- Ensure compliance with all treaties and regulations
- Reduce audit risk
- Eliminate the need for outside consultants and firms
- Receive personalized answers to substantive questions from experts
- Stay up to date with changing laws and forms

## WHY USE TAX NAVIGATOR?

The tax and immigration laws are becoming increasingly complex with increased focus on payments made to non-U.S. citizens and organizations. International Tax Navigator analyzes the interrelated immigration, tax, and treaty rules to ensure that payments are withheld and reported correctly.

## ACHIEVE ACCURACY AND ASSURANCE

Gain confidence when making payments to non-U.S. citizen workers, trainees, students, and other individuals. International Tax Navigator provides the tools you need:

- Analyzes a variety of payments:
  - Employment and self-employment compensation
  - Prizes and Awards
  - Scholarships and Fellowships
  - Honoraria
  - Royalties
  - Artist/Athlete
- Determines correct withholding rates by analyzing U.S. tax residency status, resident or nonresident, using an individual's immigration status history and days of U.S. presence
  - Performs complicated substantial presence test in seconds
  - Performs case-by-case analyses of income tax treaties for each type of payment
  - Creates audit reports of treaty analyses identifying all limitations
  - Determines applicable taxes, tax rates, and exemptions from tax for payments
  - Prepares completed withholding certificates, Forms 8233, W-4, W-8BEN, and W-9
  - Creates Forms 1042-S submissions for the IRS

## CONVENIENT DATA ENTRY AND FORMS DELIVERY

Using International Tax Navigator's Foreign National Information System (FNIS), foreign nationals can enter their demographic, immigration, and payment information online. Organizations can then send pre-filled forms (such as the 1042, 8823, W-4, W-8 BEN, and W-9) to foreign nationals via FNIS for them to print, sign, or use for tax reporting purposes.

## INTERFACE WITH PAYMENT SYSTEMS

International Tax Navigator interfaces with ERP systems to reduce data entry and streamline processing. Current ERP interfaces include:

- PeopleSoft HCM
- PeopleSoft AP
- SunGard HE Banner HR
- Workday

Thomson Reuters business analysts can also create custom interfaces with other paying systems.

## COMPREHENSIVE CONTENT FOR FURTHER INSIGHT

An International Tax Navigator license provides access to content that will help increase your understanding of NRA taxation. Resources include:

- **Users-Only Website** — search hundreds of frequently asked questions on tax and immigration issues answered by Thomson Reuters tax and immigration experts.
- **Treaty Navigator** — get information on tax-treaty rules or conditions in easy-to-understand language.



## A COMPLETE NRA TAX SOLUTION

Thomson Reuters helps you manage the spectrum of payments made to nonresident aliens and foreign vendors. Other products include:

- **Foreign National Tax Resource** — an online tax preparation software and content library that helps foreign nationals complete their 1040NR and 1040NR-EZ forms.
- **W-8 E-Compliance** — a web-based solution that streamlines and automates the collection of W-8 forms from foreign vendors.

### Prepare and Print a Variety of Forms

- Form 1042, Annual Withholding Tax Return for U.S. Source Income for Foreign Persons
- Form 1042-T, Annual Summary and transmittal of Forms 1042-S
- Form 1042-S, Foreign Person's U.S. Source Income Subject to Withholding
- Form 8233, Exemption from Withholding and Supporting Certifying Statement
- Form 8833, Treaty-Based Return Disclosure
- Form 8843, Statement for Exempt Individuals
- Form W-8BEN, Certificate of Foreign Status
- W-4, Employee's Withholding Certificate
- W-9, Certificate of U.S. Status
- W-7, Application for Individual Taxpayer ID (ITIN)
- I-9, Employment Eligibility Verification
- SS-5, Application for Social Security Card
- W-8ECI, Certificate of Foreign Person Claiming Withholding Exemption
- W-8IMY, Certificate of Foreign Intermediary

Contact us today to see how International Tax Navigator can help improve your NRA tax compliance at [ONESOURCENonresidentAlienTax@thomsonreuters.com](mailto:ONESOURCENonresidentAlienTax@thomsonreuters.com) or 800-331-2533.

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