TAXES 101
for Graduate Students

Brought to you by:
Office of Graduate Studies
Office of International Education
GTHR/Global Human Resources
Bursar’s Office
Introductions

• James Black – Office of Graduate Studies
• Charlie Hammons – Office of International Education
• Doug Podoll – Global Human Resources
• Susan Morrell – Bursar’s Office
• Review of requirements for NRA taxpayers
  • Nonresident Aliens for tax purposes
  • U.S.-based income only—required by immigration status
  • Limited deductions and credits (no family allowances)
• Resources provided for NRAs by GT
• Fundamental issues and resources for U.S. taxpayers
  • U.S. citizens and permanent residents
  • Resident Aliens for tax purposes
1. Are you a Resident or Non-Resident for Tax Purposes?
   • If you have been here for **less than 5 years**, you are a **Non-Resident**

2. Use GLACIER to determine Tax Status and Treaty Benefits

3. Were you employed at all during 2017? Or received scholarship for room & board?
   • If NO, go to [oie.gatech.edu/nrtaxes](http://oie.gatech.edu/nrtaxes)
   • Complete form **8843**
1. Obtain all W-2s and/or 1099s from all employers

2. Use GLACIER to obtain 1042-S (necessary for both Residents and Non-Residents)
   - 1042-S will be released after February 12, 2018
   - Transfer student may need 1042-S from former school

3. Request Sprintax Access Code
• Available to **Non-Residents only**

• Free FEDERAL Tax form preparation
  • State forms are $26 per state

• Request login code through iStart
  • Available after Feb 12th, 2018

• All forms must be printed and mailed.
• 8843 Questions – oie.gatech.edu/nrtaxes
• Georgia Tax form (Form 500) help – oie.gatech.edu/nrtaxes
• Sprintax Access – info@oie.gatech.edu
• NRA Questions – See the ‘International Student & Scholar Tax FAQs’ at http://ohr.gatech.edu/tax-compliance
• Resident for Tax Purposes with Tax Treaty – nra.ask@ohr.gatech.edu
• Specific/Detailed questions about your NRA personal tax return – nra.ask@ohr.gatech.edu
• Tax treaty questions – nra.ask@ohr.gatech.edu
• GLACIER - nra.ask@ohr.gatech.edu
• One and the same
  • Worldwide income
  • Lots of deductions and credits
    • Lifetime Learning Credit, American Opportunity Credit, Earned Income Credit, etc.
  • No requirements if income < $10,400
  • Personal exemption $4,050—check with mom and dad
  • Spouse and dependents

• Tax treaty benefits for:
  • Bangladesh, Belgium, Bulgaria, China, Malta, Netherlands, Pakistan
• Forms
  • W-2s
  • 1099-misc, int, div, g
  • 1042-S (internationals only)
  • 1098-T
  • 1095-C
• [http://www.bursar.gatech.edu/content/tax-credits](http://www.bursar.gatech.edu/content/tax-credits)
• Trust the software
  • Beware of street corner tax offices—be an intelligent consumer
When available, your 1098-T can be found at www.tsc1098t.com
• Income < $66,000
  • Check for federal + state and other restrictions

• E-file
  • Want your refund this year or next?

• Extensions
  • 2017 Deadline: 17 April 2018
  • More time, but can’t delay payment

• IRS Resources
  • Pub 970 Tax Benefits for Education & Pub 4011 Foreign Student & Scholar Vol
  • Resource Guide
UPCOMING EVENT REMINDERS – CRIDC

February 8 + 9, 2018

Georgia Tech Career, Research and Innovation Development Conference (CRIDC)

- **Expert Panels:**
  - Consulting
  - Academia
  - Industry
  - Entrepreneurship
  - Emerging Trends (big data, biosciences)
  - Women in STEM
  - Navigating Work Visas
  - Company Inclusivity, Diversity, and Adaptability

- **Poster Competition** – Feb. 8
- **Graduate Career Fair** – Feb. 9
- **Company Info Sessions**
FOUNDATIONS OF PERSONAL FINANCE:

A five-week course that empowers both undergraduate and graduate students to save, budget, avoid debt, and spend wisely. Students will learn the skills to start practicing sound financial habits now that will set them up for success in the future.

- **Session A:** running now
- **Session B:**
  - March 26th through April 23rd
  - Mondays, 5-6pm
  - Location: Skiles 171

Sponsored by Health Initiatives, register here: [https://healthinitiatives.gatech.edu/finance](https://healthinitiatives.gatech.edu/finance)