



**REQUEST TO COMMENCE ADVANCES OF TAX
REIMBURSEMENTS ON IDB GROUP RETIREMENT BENEFITS**

Please complete, to the extent applicable, sign and return this Request to the IDB Deloitte Tax Team by email: taxconsultants@iadb.org.

Name	Retiree ID#
Home Address (number, street, city, state, zip code)	
Country if Outside U.S.	Telephone Number (country code, area code, #)

1. Please indicate the jurisdictions (national and local) where your IDB Group retirement benefits are taxable in the current year:

Country:

Local (e.g. state, province, canton):

2. Were you a tax resident of this jurisdiction on the date of your retirement? ☐ Yes ☐ No

If "no", enter the date you became a tax resident: _____

(U.S. tax residents should refer to page 8 of the Tax Reimbursement Handbook for IDB Group Retirees for information on when U.S. tax residency commences.)

3. Did you receive a pension commutation? ☐ Yes ☐ No

If "yes", enter the date when you received the commutation: _____

4. Enter the date of your first monthly pension payment: _____

5. **For U.S. Tax Residents Only:** Please complete the chart below with expected information for the current year:

	Expected Entry on Federal Tax Return for Current Year
Filing status (Single, married joint, head of household, etc.) *	
Total spouse taxable income **	
Number of children under age 17	
Number of other dependents, not included in previous entry	
Real estate tax deduction (refer to IRS Schedule A, line 6)	
Home mortgage interest deduction	
* If your actual filing status is Married Filing Separate, your tax reimbursement will be calculated using the filing status of Married Filing Jointly unless you satisfy the criteria for an exception. See Tax Reimbursement Handbook for IDB Group Retirees, page 17.	
** Include all sources of spouse income (employment, investment, etc.), and exclude 401(k) contributions, if applicable.	

6. For Non-U.S. Tax Residents Only:

Please estimate the total amount of taxes, in local currency, that you expect to pay on your SRP pension in the current year:

Deloitte will review your estimate, which is subject to adjustment. If you would like to have advances estimated for you, you can leave the above entry blank.

Non-U.S. tax residents shall provide along with this request the following documents:

- a) Documentation supporting the estimate provided above.
- b) Up to date copies of the relevant forms and instructions issued by the applicable taxing jurisdictions to assist Deloitte in reviewing and/or recalculating the estimate of advances.

Any additional information which you consider pertinent regarding your tax obligations should be shown on a separate attached page which shall be considered an integral part of this form.

I understand that:

(a) the information supplied above will be relied upon by the Bank to calculate tax advances made to me on my taxable IDB Group retirement benefits for the applicable year. Therefore, I affirm that the information I have provided above is true and accurate with the understanding that the estimated amounts are tentative. If there are any material changes to the information I have provided, I will immediately advise Deloitte.

(b) in order to establish my legal claim to any monies advanced to me by the Bank for anticipated tax liabilities on my IDB Group retirement income, it will be necessary for me to comply with the settlement procedures established by the Bank. If I fail to comply with these settlement procedures or, if upon review by Deloitte the determination is made that I am not entitled to the full amount of advance payments made to me, I will promptly repay the Bank any excess advances made to me, as appropriate. Until I have complied with the settlement procedure and have repaid any excess advances, no subsequent tax advance payments will be made to me.

(c) the settlement procedures require the submission of my tax returns to Deloitte for purposes of the Settlement computations and/or resolution of any points in question.

(d) all data and documents included in this request, as well as data and documents submitted as part of the settlement process, are subject to confirmation by the Bank, which may, at any time, request for verification purposes further documentation, including tax transcripts or other reports from the applicable tax authority.

SIGNATURE: _____ DATE: _____