



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

This form applies only to retirees who have already been receiving advances of tax reimbursement, and who have experienced a change in circumstances that may affect the amount of their advances.

Please complete, to the extent applicable, sign and return this Request to Deloitte Tax LLP by email to: 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, #)

For U.S. Tax Residents Only: Please check the box or boxes below to indicate the change(s) that may impact your taxes, and provide the applicable information for the current year for each checked box:

- ☐ New filing status: _____
- ☐ New state of residence (or none): _____ Date of move: _____
- ☐ New Spouse Income Amount: _____
- ☐ Number of children under age 17: _____
- ☐ Number of dependents other than children under age 17: _____
- ☐ Change in deduction amount (specify deduction and new amount): _____
- ☐ Other (please specify): _____

For Non-U.S. Tax Residents Only:

Please explain the circumstances supporting your request for a change in the amount of your tax advances: _____

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

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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: _____