



**TAX FORM 7R-INT (For non-U.S. taxpayers)**  
**RETIREE TAX REIMBURSEMENT APPLICATION / CONFIRMATION**  
**FOR THE 2019 CALENDAR YEAR**

**Deadline: June 26, 2020**

To: Deloitte Tax LLP  
Email: [idbtaxdocuments@deloitte.com](mailto:idbtaxdocuments@deloitte.com) Fax: 1-833-920-1035  
Upload: [www.ga.deloitte.com](http://www.ga.deloitte.com)

Name:  Retiree No:

Email:  Telephone:

Country of Tax Filing:

**(A) DECLARATION (Mandatory for all recipients of 2019 tax reimbursements)**

- 1) I affirm that the information I have provided on this Form 7R-INT is true and accurate and that my tax returns that I am attaching to this form are true copies of the tax returns I have filed with the applicable tax authorities. If the attached tax returns are subsequently amended or adjusted, I will provide true and accurate copies of any such amendment or adjustment. I understand that the Bank may request additional documentation to support the information entered on this form.
- 2) I understand that my 2019 tax reimbursement will be calculated or recalculated based on the information entered on this form. I also understand that if I have received estimated payments of my tax reimbursement for 2019, the entries below may result in a positive or negative adjustment of my 2019 tax reimbursement.
- 3) I affirm that: I am in compliance with applicable national and/or local tax laws; if I have received quarterly estimated tax reimbursements in 2019, I have used these funds to pay required estimated taxes; I have filed the tax returns required in my jurisdiction for 2019; and, to the best of my knowledge, I have calculated my taxes for 2019 using all the exemptions and deductions to which I am entitled and the most economical legal filing status to minimize my tax liability.
- 4) I further understand and agree that any material misrepresentations on my part or failure to inform the Bank of any changes in my tax status may result in appropriate action being taken by the Bank including having future tax reimbursements being made payable jointly to me and the appropriate tax authority until the matter is settled to the satisfaction of the Bank, and may be the basis for suspension of future tax reimbursements.
- 5) I agree that my handwritten signature or my typed name in the box below is valid as my signature.

Signature:	<input type="text"/>	Date:	<input type="text"/>
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**Note: If you complete this form electronically, please save the form after completing it and before uploading it. Alternatively, PRINT to PDF to ensure inputted data is included in your submittal.**

**A) Basic Data**

1. Enter your actual filing status on your 2019 tax return  
Single  Married Filing Jointly  Married Filing Separately   
Head of Household  Qualifying Widow(er)

2. If you are married, is your spouse also an IDB employee or retiree?  
Yes  No   
If yes:  
i. name of spouse: \_\_\_\_\_  
ii. spouse's Bank ID#: \_\_\_\_\_

3. If you are receiving two IDB pensions, one as a surviving spouse and another one as an IDB retiree, please provide your two Bank ID numbers:  
\_\_\_\_\_ and \_\_\_\_\_

4. Status changes:  
Has your mailing address or email address changed since you submitted your tax reimbursement application/ confirmation last year? Or, if you retired in 2019, has your address changed since retirement?  
Yes  No

Have there been other changes in your circumstances that may affect your tax reimbursement calculation e.g. *employment, relocation, spouse status changes, etc.*?  
Yes  No

Please specify relevant changes in the space below:

5. I confirm that I have no tax filing requirements in the United States (check)

**B) My Retirement Income from the IDB**

I confirm that the income I received and reported on my 2019 income tax returns from the IDB Staff Retirement Plan, including tax reimbursement, is:

- 1) 2019 Gross Retirement Benefits\* .....
- 2) 2019 Taxable Retirement Benefits\* .....

\*Per Letter/Certificate of pension received from IDB

Per tax return in local currency  
after exchange rate has been applied.

### C) Required Documents to Submit along with Form 7R-INT

Please submit along with this form full true copies of all pages of your 2019 tax return/s as filed with tax authorities.

Additionally, if your tax returns are amended or adjusted by tax authorities, you will need to submit full true copies of any amendments to your 2019 tax returns or copies of adjustments to the returns by the taxing authorities within 60 days after such filing or notification of adjustments.

**Canadian taxpayers only:** if you use a filing status of Married Filing Separately and have allocated a portion of your IDB pension income to your spouse's individual income tax return, please submit a copy of spouse's return in addition to a copy of your tax return.

#### Notice Regarding Submittal of Tax Returns:

- a) All copies of tax returns, schedules and forms that you submit to Deloitte Tax LLP ("Deloitte") along with Form 7R-INT are subject to use by the Bank and by Deloitte under contract to the Bank for the purpose of calculating the appropriate tax reimbursement for calendar year 2019.
- b) Deloitte and the Bank will treat your tax returns, schedules, and forms in strict confidence and will use such tax returns, schedules, and forms only as necessary to calculate and verify your tax reimbursement.
- c) Neither Deloitte nor the Bank will be responsible (1) for the mathematical accuracy of your tax returns, (2) for your compliance with tax laws or regulations or, (3) for the content or preparation of your returns.
- d) Any penalties and interest that may be assessed by any taxing authorities with respect to the timeliness of your tax filings or the amount of your tax payments are your sole responsibility.