

Dear Retiree,

We are eager to start the 2017 settlements process and you may now submit your 2017 income tax information for this purpose.

As in past years, retirees to whom quarterly retirement tax advances were paid in the past year must submit their 2017 income tax information for purposes of the settlement.

Also, retirees who have not received tax advances may choose to submit their 2017 income tax information to request a settlement calculation. The details for submitting your information are set out below.

Deadline: The due date for submitting your 2017 tax information is July 6, 2018. Please note that if you have filed an extension to file your 2017 U.S. Individual Income tax return (Form 4868), you will need to provide a copy of this form. The deadline for those who file an extension with the IRS is **September 30, 2018**.

If you have already completed and filed your 2017 tax returns, you are welcome to send us your information now.

1. Forms and documents to send to Deloitte:

1) Individuals who file in the US:

- a) A complete copy of your 2017 US **federal return**
- b) A complete copy of your 2017 US **state return(s)**
- c) **IDB Tax Form 7R** to indicate/report any spousal income for those filing a joint tax return. If you file as single or separate you still need to complete this form, but you may disregard sections B and C.
- d) Signed and dated IRS Form 4506T (instructions to complete this form are included with the form in the same attachment.)

2) Individuals who file **non-US** tax returns:

- a) A complete copy of your **international tax return(s)** covering the 2017 tax year
- b) **IDB Tax Form 7R Intl** for non-US filers; there is a specific version of the form designed to record your relevant details.

If you use a tax professional to assist you with the completion and filing of your 2017 tax return(s) please feel free to share form 7R with this advisor so that they can help you to complete it alongside your tax return.

2. Methods for sending your information:

You should upload your information to Deloitte's secure website, www.ga.deloitte.com. This will allow immediate delivery of your documents and they will be stored securely. It is also possible to forward your documents to Deloitte via fax, or password-protected attachment to

an email. Please remember that only the Deloitte team assigned to the IDB engagement will have access to your personal information and tax documents.

To send your information, please use one of the following:

- Upload to www.ga.deloitte.com (see instructions on accessing your account at Appendix 1 below)
- Fax to 1-703-738-1517
- E-mail to IDBtax@ame1mail.deloitteonline.com If emailing your documents, it is important that they are password protected. We recommend using the last 4 digits of your social security number as your password. If for any reason you are unable to password-protect the file(s) containing your tax return(s), please do not email them to us.
- Mail hard copy documents to:
Deloitte Tax LLP, Suite 800
7900 Tysons One Place
McLean, VA 22102-5971

Please note that, if you mail hard copies, Deloitte will scan and post your documents to a secure website and will destroy the hard copies. Therefore, **please do not send original documents to Deloitte.**

3. Acknowledgement of information receipt

If you don't receive an email or letter of acknowledgment from us within 2 weeks of submitting your 2017 tax documents and Form 7R/Form 7R Intl, please call 202-623-2766 so that any issues may be identified and resolved.

If you would like any additional information or have any other questions, please call our tax settlement assistance line at 202-623-2766 or send an email to Taxconsultants@iadb.org.

Sincerely,

Your IDB Deloitte Tax Consultant Team

Adobe Acrobat or Adobe Reader is required to view these documents. If you do not have Adobe Reader, you may download it free by clicking the box below:

<https://get.adobe.com/reader/>

Appendix 1 - Instructions for Accessing Your Account on Deloitte's Secure Website

If you have an e-mail address on file with the IDB, you should already have received two e-mails from Deloitte's GlobalAdvantage system. These e-mails contained your User ID (which is your email address on record) and a temporary password and would have allowed you to access your account on Deloitte's secure website www.ga.deloitte.com.

When accessing the site for the first time, you should be asked to agree to the terms and conditions, to change your temporary password, and select two security questions. If you don't recall receiving the original email, you can simply access our site at www.ga.deloitte.com using your email address and click on "forgot your password".

If you then don't receive a password reset email after a few minutes, please contact us at 202-623-2766 or via email to taxconsultants@iadb.org so that we may verify your information on record in our system.

You can share your documents with Deloitte by uploading them through the "My Documents" tile. To upload your tax returns and your IDB Tax Form 7R, simply click on the "Add" or "+" icon and select the relevant tax year – 2017/2018 – to upload, locate the required document(s) in your local desktop folders and provide a description; then click "Save."

Welcome to Deloitte GlobalAdvantage.



Please Setup Calendar

TIMELINE

January 2018	
Completed	Jan 29, 2018
Completed	Jan 23, 2018
Completed	Jan 5, 2018

APPLICATIONS

Tax Guides and Country

How Do I...

Documents

QUICK APPS

Documents for IDB Retiree, XXXXXX

TAX DOCUMENTS - FROM YOU

CY2014/FY2015 ^



2014 US7216 Consent Copy -1/29/2015 10:53:30 AM



ADD DOCUMENT

TAX DOCUMENTS - FROM YOU

CY2013/FY2014 ^



2013 US 7216 Consent Copy - 2/5/2014 2:32:02 PM



ADD DOCUMENT

For your convenience **the new 2017 Form 7R has been provided to you along with this letter (in PDF or hard copy)**. If you prefer, you may complete a hard copy of the form by hand and return it to Deloitte. Otherwise, please type/select the relevant data in the writable PDF version of the form. This may be sent back to us electronically without the need for a hand written signature (as long as you type your complete name and date it).