

**Inter-American Development Bank
TAX REIMBURSEMENT ON PENSIONS**

**MEMORANDUM AND CERTIFICATE
SETTLEMENT SUBMISSION - CALENDAR YEAR 2010**

SPECIAL CONFIDENTIAL PROCEDURE

Name	Retiree No.
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In accordance with the policies and procedures established under the provisions of Section 338A of the Inter-American Development Bank Personnel Policies, I am enclosing certain summary information derived from my National and Local income tax returns for Calendar Year 2010.

I understand that:

- a. because I have elected to present this submission under Special Confidential Procedures, I may be required by the IDB to provide, to an independent third party, information verifying the summary information contained in this submission;
- b. if, in the event of such review by a third party, it were determined that summary information contained herein is incorrect, incomplete, or inaccurate, the independent third party would provide the IDB with corrected information so that tax settlement calculations could be revised;
- c. upon completion of your review a statement will be provided to me indicating the results of your review; and
- d. you will hold the information contained herein in strict confidence.

CERTIFICATE

- 1) I affirm that my estimated tax payments, if any, due for calendar year 2010 have been paid to the appropriate taxing authorities and that to the best of my knowledge I have calculated my taxes for calendar year 2010 using all exemptions and deductions to which I am entitled and under the most economical legal filing status to minimize my tax liability.
- 2) I affirm that I have completed Schedule I, Form 7RC to the best of my ability and that the information contained on that Schedule is accurately summarized in Section B, and that information contained in Section A accurately reflects the income of my spouse, and that I have used the filing status indicated in Section C, and have filed a state income tax with the State indicated in Section D.

I understand that I should submit summarized information from any amendments to my 2010 tax returns or adjustments to the returns by the taxing authorities within 60 days after such filing or notification.

I understand that this request must be submitted by July 9, 2011, unless the due date for filing my 2010 returns has been extended beyond that date.

A) SPOUSE INCOME

I confirm that my spouse's 2010 income consisted of the following:

	Federal	State
Salary (W-2)		
Interest (Schedule B)		
Dividends (Schedule B)		
State Tax Refund		
Business Income (Schedule C)		
Capital Gain or Loss (Schedule D)		
Pension Income (Taxable)*		
Rental/Partnership Income (Schedule E)		
Social Security Income (Taxable)		
Other Income (List):		

Less Adjustments to Gross Income: (Form 1040, Lines 23 – 35)		
Spousal Adjusted Gross Income		

B) INFORMATION FROM FORM 7RC, SCHEDULE I

IDB Taxable Retirement Income (Schedule I, Line 2)		
Deductions for Reimbursement (Schedule I, Line 9)		

C) FILING STATUS

- Joint
- Married Separate
- Single
- Head of Household

D) STATE OF RESIDENCE

- D.C.
- MD
- VA
- Other (Specify)

Signature	Date	Daytime Phone
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**MAIL TO:
 INTER-AMERICAN DEVELOPMENT BANK
 P.O. BOX 920
 BERRYVILLE, VA 22611**

Inter-American Development Bank Schedule of Adjusted Gross Income, Itemized Deductions, & Personal Exemptions

THIS SCHEDULE SHOULD NOT BE SUBMITTED WITH FORM 7RC

	U.S.	State
1. Spouse Income from confirmation Form 7RC, Section A		
2. IDB Taxable Retirement Income		
3. Total (lines 1 + 2)		
4. Adjusted Gross Income	1/	2/
5. Ratio for Deductions		
(divide line 3 by line 4 – not to exceed 100%)	%	%
6. Itemized Deductions	3/	4/
7. Personal Exemptions	5/	6/
8. Subtotal (lines 6 & 7)		
9. Amounts to be used in Settlement Calculations (line 5 x line 8)		

- 1/ U.S. Form 1040, line 37
- 2/ D.C. Form D-40, line 16, or Maryland Form 502, line 18 or Virginia Form 760, line 9
- 3/ U.S. Form 1040, line 40
- 4/ D.C. Form D-40, line 17 or Maryland Form 502, line 19 or Virginia Form 760, line 10
- 5/ U.S. Form 1040, line 42
- 6/ D.C. Form D-40, line 20 or Maryland Form 502, line 21 or Virginia Form 760, line 11