

Dear Fellow Retirees,

We are excited to let you know that the Finance Department (FIN) has introduced a new feature on the Retiree Portal for retirees who are currently not U.S. Citizens/Green Card holders. This new feature enables retirees who are not US Citizens/Green Card holders to easily review and submit their U.S. Income Tax Status directly through the Retiree Portal, without having to mail paper forms or separate emails.

To clarify, the tax certification via the new self-service feature on the Retiree Portal is specifically required for retirees living in the US. For retirees living overseas, their pensions are not reported to the IRS unless they are US citizens, Green Card holders, or they file their taxes jointly with their US citizen or Green Card holder spouse.

For those retirees who need to update their visa status, they can contact FIN through the "Help" page on the Retiree Portal or by sending an email to FINIRP@IMF.ORG.

IMFRA is very grateful to FIN for its continuous efforts, as reflected in this enhancement, to improve the retiree experience by providing a convenient, user-friendly self-service tool.

Please find below, the step-by-step instructions for accessing and submitting the digital form for U.S. Income Tax reporting:

1. Log in to the Retiree Portal and go to "My Pension and Tax"
2. Select 'Certification of U.S. Income Tax Status'.
3. Choose the appropriate options, attach document if needed and submit the required information on the digital form.

This Retiree Portal self-service feature allows retirees to:

- Certify their tax status (e.g., Non-resident, Resident)
- Confirm their residency or citizenship status
- Upload supporting documents as necessary

FIN and IMFRA encourage all retirees to take full advantage of this new feature and to continue using the Retiree Portal as their go-to self-service resource.

Thank you.

IMFRA Board of Directors