



Request for settlement of 2023 income taxes

Checklist

(Do not include with your submission)

This checklist is intended to assist staff members who are submitting claims for reimbursement of 2023 income taxes to ensure that they have submitted complete and correct claims in a timely manner. To facilitate logging and processing of 2023 claims for reimbursement of income taxes, the Income Tax Unit, New York, asks that the documents submitted with your claim for reimbursement of 2023 income taxes be **signed** and ordered as follows:

- F.65
- F.65/A (if serving outside the United States)
- Federal income tax return
- New York state income tax return
- Other state income tax return(s)
- Memo attached for not claiming dependent(s) as exemption(s) on tax returns¹
- IRS Form 4506-C

Submission dates

1. My duty station is in the United States, my UN submission deadline is **1 March 2024** and my IRS filing deadline for my 2023 income tax return is **15 April 2024**.
2. My duty station is outside the United States, my UN submission deadline is **1 April 2024** and my IRS filing deadline for my 2023 income tax return is **17 June 2024**.

IRS Form 4506-C

3. I have included IRS form 4506-C with my claim for reimbursement of 2023 income taxes.
4. If I file a joint return with my spouse, IRS form 4506-C includes the name and Social Security number of my spouse.
5. I have included **only those tax years** 2020, 2021, 2022, and 2023 during which I was a United Nations staff member.
6. IRS Form 4506-C includes my address as on my 2023 IRS form 1040 filed.
7. I have dated IRS form 4506-C according to the **American** dating convention of **MM/DD/YYYY** in numerical format.
8. I have not altered the signature/date of IRS form 4506-C with correction fluid or by crossing out or otherwise altering the signature/date on the form.

Forms F.65 and F.65/A

9. I have completed all mandatory fields including my index number, my Social Security number, my name, and my spouse's name, Social Security number and index number (if applicable).
10. I have indicated the date my citizenship or residency status in the United States changed in 2023.

Income tax returns

11. I have included signed, complete copies of my **2023** federal and all applicable state income tax returns.
12. I must file my 2023 income tax returns by the IRS filing deadline applicable to me or, in the alternative, I must apply to the IRS for an extension of time to file using IRS form 4868 before my IRS filing deadline. I understand that the United Nations will not file my tax returns on my behalf.

¹ For staff members receiving dependency benefits.