



Request for 2023 income tax settlement and 2024 income tax advances

Part 1: Personal data (please print)

Staff member

Index No.: _____
 Last name: _____
 First name: _____
 Social Security No.: _____
 Organization: UNHQ UNDP UNICEF
 Other: _____

Visa status since 1 January 2023:

US citizen US permanent resident (PR) and have signed the waiver*

Current duty status:

Active Separated on Other

Office: Rm No. _____ Tel. _____
 Home / Cell. Tel: _____
 UN e-mail: _____
 Personal e-mail**: _____
 Tax Cheque Mailing address: _____

- I am currently stationed outside of USA and I choose to have the cheques sent to the address above
 I have been assigned to an overseas duty station during 2022, 2023 and 2024. I have completed and included form F.65/A

Spouse

(Fill this part if spouse's UN emoluments are subject to US income taxes)

Index No.: _____
 Last name: _____
 First name: _____
 Social Security No.: _____
 Organization: UNHQ UNDP UNICEF
 Other: _____

Visa status since 1 January 2023:

US citizen US permanent resident (PR) and have signed the waiver*

Current duty status:

Active Separated on Other

Office: Rm No. _____ Tel. _____
 Home / Cell. Tel: _____
 UN e-mail: _____
 Personal e-mail**: _____
 Tax Cheque Mailing address: _____

- I am currently stationed outside of USA and I choose to have the cheques sent to the address above
 I have been assigned to an overseas duty station during 2022, 2023 and 2024. I have completed and included form F.65/A

* Form I-508, "Waiver of Rights, Privileges, Exemptions and Immunities".

** To be used to contact staff member after separation.

Part 2: Request for 2024 Estimated Tax Advances - Yes No

(Complete the following section ONLY if you have checked "Yes" box above)

If you have checked 'No', you will be liable for any estimated tax underpayment, penalty/interest for 2024.

I am requesting estimated tax advances		<input type="checkbox"/> Federal	<input type="checkbox"/> Self-Employment	<input type="checkbox"/> State	<input type="checkbox"/> NY City	<input type="checkbox"/> Yonkers
Total number of federal exemptions on form 1040: _____		Expected non-UN earnings in 2024: \$ _____				
I expect to use <input type="checkbox"/> Standard deduction <input type="checkbox"/> Itemized deduction \$ _____		on my federal and _____ on state tax returns.				
<input type="checkbox"/> I have/plan to move in/out of NY City/Yonkers from _____		to _____ on the following date: _____				

(over)

Part 3: Declaration

For staff member(s) requesting 2024 income tax advances and/or 2023 income tax settlement

1. I certify that any cheques made payable to a tax authority received from the United Nations in response to my requests for tax advances or reimbursements will be transmitted promptly to the tax authorities named on the cheques solely to meet my income tax obligations and will never be deposited into a personal account.
2. I certify that I will provide the United Nations, upon request, with acceptable proof of taxes paid or other documents or information as may be required to verify my tax liabilities.
3. I certify that I will refund to the United Nations any overpayment of tax reimbursements or advances, together with any interest received as a result of any such overpayment made by the United Nations.
4. I authorize the United Nations to make estimated tax advance deposits on my behalf to the federal tax authorities through the Electronic Federal Tax Payment System (EFTPS) and to the state/local tax authorities.
5. I authorize the United Nations Income Tax Unit to obtain information on my pension fund withdrawals from the United Nations Joint Staff Pension Fund.

For staff member(s) requesting 2023 income tax settlement

6. I certify that any settlements which I have received from the United Nations for the purpose of meeting income tax liabilities of previous years have been paid by me to the appropriate tax authorities and that no part of such money has been refunded to me by the income tax authorities which I have not refunded to the United Nations.
7. I certify that the signed copies of my income tax returns for 2023, which are attached, are **true, correct and complete copies** of final returns, that they correctly reflect my tax liabilities for 2023 and that they are the basis on which settlements for 2023 taxes are requested.
8. **I certify that the information contained in the attached income tax returns is identical to that contained in the corresponding submission to the tax authorities. I understand that false certification constitutes misconduct leading to appropriate disciplinary sanctions including recovery from any future entitlements under the Staff Rules and Regulations.**
9. (For United States citizens stationed in the United States only) I certify that, as a United States citizen, I am subject to United States self-employment tax on my United Nations earnings and that I am entitled to the difference between the amount of the Social Security tax I am required to pay as a United Nations staff member and the amount I would have to pay as an employee of a taxable employer. I have reported my self-employment tax on my United States income tax form 1040, and I have attached to my return a copy of schedule SE.
10. I certify that I have minimized my income tax for 2023 by utilizing all adjustments to income, deductions and exemptions to which I am entitled, including the itemizing of deductions if they exceed the standard deduction allowable.
11. If I have received United Nations dependency benefits for relative(s) residing in the United States, Canada or Mexico, I certify that I have claimed these relative(s) as dependent(s) on my income tax returns or I have provided acceptable explanation as to why not.
12. I certify that I will notify the United Nations within 30 days if for any reason it is necessary for me to file an income tax return which is different from the returns I have herewith submitted and will furnish a copy of the new return to the United Nations.
13. I certify that I will notify the United Nations within 30 days of any amended returns subsequently filed or any change in my tax liability which might require adjustment of the tax payments received in any year.
14. I have completed in full, signed, dated currently, and attached the form 4506-C (10-2022).

All information contained herein certified true and correct

Staff member's signature

Date: _____

Spouse's signature

(Sign only if receiving United Nations emoluments which are subject to the United States income tax)

Date: _____

Send to: United Nations, Income Tax Unit, Rm FF-0300, 304 East 45th St., New York, NY 10017, United States of America, with required documents.