

Who should complete this document?

This document should be completed and provided to Banco Popular de Puerto Rico by participants which have 1) their Retirement Plans serviced by Banco Popular de Puerto Rico and 2) comply with the following 3 conditions:

1. Participants that prepaid taxes for balances in Retirement Plans as permitted by Puerto Rico Treasury Department thru Sections 1023.21, 1081(b)(9) or 1012(b)(5), as applicable
2. Participants that received disbursements from Retirement Plans during taxable year 2022
3. Participants that will claim a portion of their prepayment basis against Retirement Plan disbursements received during taxable year 2022

With the information provided by participants, Banco Popular will proceed to amend the 4807.C Informative Return issued to the participant for taxable year 2022. Amendments will be processed and issued after the receipt from participants of all the necessary information to perform the process. Such process will take 5 business days to complete.

Banco Popular reserves the right to disregard any amendment requests which considers to be in non-compliance with the requirements included in this document. Please read carefully the instructions included in this document.

Instructions

Please complete, print and sign the document and proceed to send it to the Fiduciary Services Division of Banco Popular following one of the options below:

1. Coordinate with a Telebanco Service Representative to send through e-mail the document. The document needs to be an *Acrobat* (pdf) format document. Please include in the subject line of the email the case number assigned by Telebanco.
2. By mail to the address stated below:

Banco Popular de Puerto Rico, Fiduciary Services
PO Box 362708 San Juan PR 00936-2708
Att. Payments Group Code 725

3. Physically:

Fiduciary Services Division
209 Avenida Muñoz Rivera
Popular Center, North Building, 4th Floor
Hato Rey, PR 00918

Supplementary Information for Informative Return 480.7C, Taxable Year 2022

Retirement Plan Name	
Participant Name	
Participant's Social Security number	
Amount over which a Prepayment was made under Sections 1023.21, 1081.01)(b)(9) o 1012D(b)(5) Note: Do not state the total amount of the prepayment made. Please state the proportion of the prepayment amortized due to retirement plan payments received during taxable year 2022.	

I _____ (participant's name), declare that the information provided in this document is correct. I authorize Banco Popular de Puerto Rico to amend the 4807.C Informative Return 480.7 for taxable year 2016 in regards to the presentation in the Informative Return of the information related the prepayment of taxes I made thru Sections 1023.21, 1081(b)(9) o 1012(b)(5), as applicable.

I confirm that the information provided in this document is not a representation of Banco Popular de Puerto Rico, its subsidiaries nor affiliates. I also understand and accept that Banco Popular has not performed nor has the obligation to perform a review or pass judgment in regards to the veracity of the information provided in this document.

Participant's Signature

Date