

## Instruction to Provide Account Records to the IRS

---

Last Name(s)

---

First and Middle Name(s)

---

Name of Legal Entity, if any

---

Street Address / P.O. Box

---

Telephone Number

---

City, State, Zip Code

---

Country

I/We herewith declare and confirm that I am/we are willing to cooperate with the Internal Revenue Service ("IRS") and to disclose to the IRS the Account Records relating to the account(s) held by UBS AG under the Master Number(s) indicated above, in my/our name(s) or in my/our interest (the 'Account(s)').

I/We understand that "Account Records" include, amongst other things:

- a) documents identifying the account holder, the beneficial owner and / or authorized persons;
- b) documents pertaining to foreign entities established or operated on behalf of the United States taxpayer;
- c) account opening documents;
- d) account statements and transaction confirmations, account summaries, records of wire transfers.

I/We herewith instruct and authorize UBS AG to disclose to the IRS, on my/our behalf, the Account Records in UBS AG's possession relating to the Account(s) for the period 1 January 2002 through December 31, 2009, as are or may be requested by the IRS. With this instruction, I/we hereby waive protections provided under bank secrecy laws of Switzerland.

I/We further instruct UBS AG to follow these instructions until revoked by me/us expressly and in writing. I/We confirm that I am/we are aware of the consequences that these instructions could have.

- I/We have applied for participation in the Voluntary Disclosure Program of the IRS with respect to the Account(s).

**For Account(s) held through a foreign entity:** I/We confirm:

- I am/We are authorized to act on behalf of the entity holding the Account(s). (If you have not yet submitted proof of authorization to UBS AG, please do so now.)
- The entity is no longer in existence (Please provide documents which show that entity is dissolved).



Return to

**UBS AG**

Org Unit EB5P  
PEZH CITY 2 ZUST  
Max Hoeggerstr. 80/82  
CH-8048 Zurich  
Switzerland

Tel. +41-44-237 56 10