Procedure 87-9  (Complete and sign the statement below.)

1. I was a resident of JAMAICA on the date of my arrival in the United States. I am not a United States citizen. I have not been lawfully accorded the privilege of residing permanently in the United States as an immigrant.

2. I have accepted an invitation by the United States government (or by a political subdivision or local authority thereof), or by a university or other recognized educational institution in the United States, to come to the United States for a period not excepted to exceed two years for the purpose of teaching, or engaging in research the University of Chicago, which is a recognized educational institution. I will receive compensation for my teaching or research activities.

3. The teaching or research compensation received during the entire taxable year _______ (or for the portion of the year from __________ to __________) qualifies for exemption from withholding of federal tax under the tax treaty between the United States and Jamaica. I have not previously claimed an income tax treaty exemption under this treaty for income received as a teacher, researcher, or student before the date of my arrival in the U.S.

4. Any research I perform will be undertaken in the public interest and not primarily for the private benefit of a specific person or persons.

5. I arrived in the United States on ______________________ (the date of last arrival in U.S. before beginning teaching or research for which the exemption is claimed). I understand that treaty exemption under Article 22 is available only for compensation received during a period of two years beginning on that date.

ADDITIONAL COMMENTS

I certify that the information I have provided above is true, correct and complete. A copy of the treaty article citation for which I am claiming exemption appears in the box below.

Signature: _______________________________________    Date: ____________________________
**SUPPLEMENTARY PAYROLL QUESTIONS:**
*(Check appropriate boxes below and supply requested information.)*

A. Current Visa classification:
   - □ F-1 Student
   - □ F-1 Practical Trainee
   - □ J-1 Student
   - □ J-1 Practical Trainee
   - □ Other: ________________________________

   Date you received visa classification: ________________________________
   Date of visa expiration: ________________________________

B. Have you already claimed exemption under the Tax Treaty Article 22 in the current calendar year?
   - □ YES.
   - □ NO.

   Have you ever claimed exemption under the Tax Treaty Article 22 in previous years?
   - □ YES. (List the calendar years you claimed the exemption. ________________________________
   - □ NO.

C. Were you ever a student at another U.S. educational institution obtaining education, training, or special technical experience?
   - □ YES. (List the name of the educational institution. ________________________________
   - □ NO.

**POLICIES REGARDING TAX TREATY EXEMPTIONS AT THE UNIVERSITY**

You are eligible for the JAMAICA treaty exemption for two years beginning on the date of your arrival in the U.S. It is your responsibility to maintain the appropriate, unexpired, “employment-authorized” visa classification during the period that you are receiving the benefits of this tax treaty exemption and employed at the University.

Should you exceed the two-year period of exemption and you notice that no Federal or State tax has yet been withheld from your paycheck, it is your responsibility to inform the Payroll Department immediately, (773) 702-5989.

You must complete the Form 8233 and 87-9 Revenue Procedure Statement for each calendar year (or portion of the calendar year) in which you claim the tax exemption. You are also required to file the appropriate tax return at calendar year-end.

Please certify your acknowledgment of the policies presented above by signing below.

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