

REQUEST FOR TAXPAYER IDENTIFICATION NUMBER AND CERTIFICATION



FINANCIAL MANAGEMENT SUPPORT

Information needed to satisfy Form 1099 reporting.

Under Internal Revenue Service (IRS) regulations, we are required to obtain your Taxpayer Identification Number (TIN) when making reportable payments to your or your company. If this information is not provided to us by you, we are required by law to withhold thirty-one percent (31%) of all payments due to you and remit those funds to the IRS as income tax withholding. Also, if you do not provide this information, you may be subject to a \$50 penalty imposed by the IRS.

Instructions:

Complete all parts and return this form to the requesting IU department or forward to: Indiana University, FMS – Tax Analysis, 400 E. 7th Street – Poplars 503, Bloomington, IN 47405. This completed form is required to be filed with us before payment can be processed.

Part I – Name, Address and Tax Status

Legal Name (As reported for Federal income tax purposes and matches number listed below)

Business or Trade Name

Address

City ST ZIP

Please indicate (X) ownership status and provide TIN

- Individual Corporation (not Medical)
Sole Proprietor LLC (Partnership or Inc.)
Partnership Governmental (U.S., State, Local)
Estate/Trust Non-Profit Organization
Health Care Provider Other
(Includes Medical Corporations)

Social Security Number

--or--

Employer Tax ID Number

Part II – Exemption

If you are exempt from Backup Withholding, you should still complete this form to avoid possible erroneous backup withholding. Enter your correct name and TIN in Part I and write "Exempt" on line provided here; sign, date and return to requester. (Individuals, sole proprietors are not exempt.)

Part III – Certification

Instructions: You must cross out item 2 below if you have been notified by the IRS that you are currently subject to backup withholding because of underreporting interest or dividends on your tax return.

Under penalties of perjury, I certify that: (1) the number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me), and (2) I am not subject to backup withholding because (a) I am exempt from backup withholding, or (b) I have not been notified by the IRS that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding, and (3) I am a U.S. person (including a U.S. resident alien).

Poplars Building
400 East Seventh Street
Bloomington, Indiana
47405-3085

Signature Title Date

Dept. Use Only Payee #