

South Panola School District

Bid



209 A Industrial Drive,
Ridgeland MS 39157

MS Contractors License: 17471-SC

Company Overview

Academic Technologies, Inc., a Mississippi Corporation, was incorporated in April 2008 and has been serving quality-conscious customers in the audio-visual, digital signage, structured cabling, CCTV, and network integration marketplace since its inception. The firm is organized into three major business units: Administration & Finance, Audio Visual Systems, Structured Cabling Systems and maintains its headquarters in Ridgeland, MS.

Our area of operation encompasses the entire state of Mississippi where we are a licensed contractor in good standing. Our technical staff is comprised of some of the most highly skilled engineers in the A/V, systems, and structured cabling arenas.

Key Personnel

Following is a brief synopsis of the background and qualifications of some key members of the Academic Technologies team:

Philip Boyd - CTS-I, CTS-D, ISF-C Design Engineer

Mr. Boyd has over seventeen years of experience in the design, installation, and maintenance of low voltage and audio visual systems. He has served as the primary project manager for the renovation of at least seven major new construction projects in Mississippi. His primary office is the Jackson location.

Joseph Dixon - CTS-I Project Manager

Mr. Dixon has ten years of management and installation experience. He is well versed in running multiple projects and installers and has a history of bringing jobs in under budget. His primary office is the Jackson location.

Trey McGregor - CTS

Mr. McGregor graduated college with a degree in Marketing and Management and having spent over 15+ years in the enterprise networking equipment industry ranging from hardware, project management, repair and customer relations.

Relevant Project Experience

Our technical staff has successfully completed many extremely complex audio visual, sound reinforcement, information technology, and structured cabling projects throughout the state of Mississippi. We have designed and implemented large-scale structured cabling systems for both initial construction projects and renovations, including voice, data, audio visual, security, and access control cabling.

We place an enormous emphasis on training and professional growth, regularly sending our technical staff members to specialized training and industry events. This is intended to focus their growth on the cutting edge products and technologies required to implement the state of the art systems found in today's institutions of higher education.

Our staff possesses vast knowledge and experience in the specific types of systems most commonly used in the government and education sector and they are intimately familiar with the specialized needs and requirements of this often unique environment. As such we stand ready to provide the services and products required to successfully complete even the most complex large-scale projects found in this segment of the marketplace.



South Panola School District

209 Bothe Street, Batesville, Mississippi 38606

Phone (662) 563-9361/Fax (662) 563-6077

Web Site: www.southpanola.k12.ms.us

Providing Opportunities for Educational Excellence

David Rubenstein, Director of Finance & Business Operations

NOTICE TO BIDDERS Interactive Display Touchscreen Televisions

ADDENDUM 1

October 20, 2021

*** I acknowledge this addendum*** TM (10/20/2021)

Remove Certificate of Responsibility and Performance and Payment Bonds sections. This isn't a construction project.

Add the following:

FEDERAL FUNDING

SPSD is planning to use the American Rescue Plan (ARP) Elementary and Secondary School Emergency Relief (ESSER) to fund this project. Vendor must comply with all federal requirements related to this project. Vendor should provide statement to comply with 2 CFR § 200.322 - Domestic preferences for procurements and any additional federal requirements.

ASSURANCES (CONFLICT OF INTEREST)

By signing the assurance page, you acknowledge: (1) no involvement, financial or otherwise, that an employee, officer or agent of SPSPD may have in your organization or any other federal requirements.

INDEPENDENT CONTRACTOR DEBARMENT VERIFICATION FORM must be included with your bid.

GENERAL

Must be in compliance with all federal, state and local laws.

Vendor and contractor are synonymous

ALL items MUST be Asbestos free.

W-9 FORM

SPSD requires a W-9 Form to be completed before a purchase order is issued.

DELIVERY

All bids items are to be based on **delivery F.O.B.**

INSURANCE (Option 2 only)

SPSD requires a current copy of liability and worker's compensation insurance to be included in your bid qualification submission. A minimum of \$1,000,000 in general liability insurance.

Awarded vendor will provide SPSP as a certificate holder on the certificate of liability insurance throughout the term of the project.

DAMAGE

SPSD will hold the successful bidder responsible for any damage caused to any SPSP property.

GOVERNING LAWS:

This agreement shall be governed by and construed in accordance with the laws of the State of Mississippi and venue for the resolution of any disputes shall be Batesville, Mississippi. Bidder expressly agrees that under no circumstances shall the SPSP be obligated to pay attorney fees or the cost of legal action to Bidder.

Vendor Bid Requirements

Assurances

Independent Contractor Debarment Verification Form

Copy of insurance and workers compensation insurance (Option 2 only)

Option One: Purchase/ Sale of School Price Sheet Completed

Product specification sheet(s)

Option Two: Installation of Interactive panels.

3 References

End of addendum 1.

ASSURANCES

I have examined the specifications outlined in the notice to bidders. My company agrees to furnish, deliver, install, train and test all items according to your specifications and instructions at the indicated price submitted. I, the undersigned understand and accept the instructions and conditions under which this bid is being submitted. I, will comply with all local, state and federal requirements.

I understand that a company officer's signature is required on this form and unless this has been done, our bid may be considered incomplete and therefore rejected.

COMPANY: Academic Technologies Inc.

ADDRESS: 209-B Industrial Dr.

CITY/STATE/ZIP: Ridgeland Ms 39157

COMPANY OFFICER NAME: Trey McGregor

TITLE: Sales

DATE: 10/22/2021

TELEPHONE: 601-427-3587

FAX: 601-605-4835

CELL PHONE: 601-750-0674

EMAIL ADDRESS: trey@academictechinc.com

SIGNATURE: *Trey McGregor*

INDEPENDENT CONTRACTOR DEBARMENT VERIFICATION FORM

(Please print clearly or type)

****Appropriate signatures shall certify statements below.**

FEDERAL DEBARMENT CERTIFICATION:

Subgrantee's/Contractor's Name	Academic Technologies Inc.
Authorized Official's Name	Trey McGregor
Complete Address	209-B Industrial Dr. Ridgeland MS 39157
Contact Number	601-427-3587 b
Are you currently registered with www.sam.gov (Yes or No) If yes, attach supporting documentation and DUNS number must be Active with open access. (Federal fund requirement)	DUNS 828357330
Are you currently registered to do business in the State of Mississippi? (Yes or No) If yes, attach supporting documentation of registration status. If not, please register and provide documentation of registration status. (Federal and State/Other fund requirement)	See Attached

CONTRACTOR hereby certify that at the execution of a contract with the Mississippi Department of Education and South Panola School District, CONTRACTOR is not on the list for federal debarment on www.sam.gov – System for Award Management.

STATE OF MISSISSIPPI REGISTRATION:

CONTRACTOR hereby certify that at the execution of a contract with the Mississippi Department of Education and South Panola School District, CONTRACTOR is not on the list for debarment on www.sos.ms.gov for doing business with the State of Mississippi or with any Mississippi State Agency or Local Governmental Entity.

PARTNERSHIP DEBARMENT CERTIFICATION:

CONTRACTOR hereby certify that all entities who are in partnership through this contract or grant with the Mississippi Department of Education (MDE) (subcontractors, subrecipients, et al.) are not on the federal debarment list on www.sam.gov – System for Award Management or the State of Mississippi debarment list. Proof of documentation of partnership verification with SAM shall be kept on file and the debarment status shall be checked prior to submission of every contract/subgrant and modification to MDE.

	10/22/2021
Original Signature of Contractor or Authorized Official	Date

Option One: Total of Sale and Delivery of (All Schools) Interactive Panels

Note: Vendor may choose to submit a bid on option one and / or option two. The vendor is not required to submit a bid for both. If not bidding on an option please put N/A for that option.

Option One: Sale and Delivery of Interactive Panels					
School	Qty Needed	MFG Part #	Item Description	Unit Price	School Investment
BES	46	MX275-V2	75 " Smart interactive panel	4099	\$188,554.00
BIS	40	MX275-V2	75 " Smart interactive panel	4099	\$163,960.00
BMS	37	MX275-V2	75 " Smart interactive panel	4099	\$151,663.00
Pope	39	MX275-V2	75 " Smart interactive panel	4099	\$159,861.00
BJHS	60	MX275-V2	75 " Smart interactive panel	4099	\$245,940.00
SPHS	88	MX275-V2	75 " Smart interactive panel	4099	\$360,712.00

Total of Sale and Delivery of (All Schools) Interactive Panels for Option One:

The vendor agrees to sale and deliver a total of 310 Interactive displays to 6 campuses and accept the terms and conditions of this bid for a total price of:

Option One Total Project Investment \$ 1,270,690.00

Option One: Submitted by: Trey McGregor

Vendor Contact Name	<u>Trey McGregor</u>
Vendor Company Name	<u>Academic Technologies Inc.</u>
Vendor Company Address	<u>209-B Industrial Dr.</u>
Vendor City, State Zip	<u>Ridgeland Ms 39157</u>
Vendor Business Phone #	<u>601-427-3587</u>
Vendor authorized signature	<u>Trey McGregor</u>

Date: 10/22/2021

Option Two: Installation of Interactive Displays

Note: Vendors may choose to submit a bid on option one and / or option two. The vendor is not required to submit a bid for both. If not bidding on an option please put N/A for that option.

Option Two: Installation of Interactive Displays				
School	Qty Needed	Item Description	Unit Price	School Investment
BES	46	Wall mount Interactive Display	144	\$6,624.00
BIS	40	Wall mount Interactive Display	144	\$5,760.00
BMS	37	Wall mount Interactive Display	144	\$5,328.00
Pope	39	Wall mount Interactive Display	144	\$5,616.00
BJHS	60	Wall mount Interactive Display	144	\$8,640.00
SPHS	88	Wall mount Interactive Display	144	\$12,672.00

Total of Installation for (All Schools) Interactive Panels for Option Two:

The vendor agrees to sale and deliver a total of 310 Interactive displays to 6 campuses and accept the terms and conditions of this bid for a total price of:

Option One Total Project Investment \$ \$44,640.00

Two

Option One: Submitted by: Trey McGregor

Vendor Contact Name	<u>Trey McGregor</u>
Vendor Company Name	<u>Academic Technologies Inc.</u>
Vendor Company Address	<u>209-B Industrial Dr.</u>
Vendor City, State Zip	<u>Ridgeland Ms 39157</u>
Vendor Business Phone #	<u>601-427-3587</u>
Vendor authorized signature	<u>Trey McGregor</u>

Date: 10/22/2021

REFERENCES

Please provide 3 references of Entities (MS Schools / School District preferred) you have done business with. Include:

SEE ATTACHED

Name of School District / Client / Company,

Client Contact Name,

Client Contact Phone Number,

Client Contact Email Address,

Short Description of Project.

EVALUATION

The South Panola School District Board of Trustees will award a contract based on the vendor submission that best meets the needs of the school system with regard to future growth, bid specifications, and not necessarily the lowest price even though the price will be the priority factor. The following factors will be considered when evaluating responses:

- 55% Price of goods and services.
- 20% Transition / Implementation / Timeline schedule.
- 10% Preference will be given for prior positive experience with the Vendor
- 10% Company Provides all Services (No sub-contractors)
- 5 % Preference will be given to Mississippi based vendors

REFERENCE FORM

Contact Name: Johnny Price
Company Name: The University of Mississippi
Address: 104 Powers Hall, University, MS 38677
Phone: 662-915-5686
Email: price@olemiss.edu
Project Start Date: 01/1/14
Project End Date: 12/31/14
Project Budget: \$ 623,617.66

Project Name: Classroom Technologies 2014 Contract

Products (26) each: Hitachi 3LCD projectors, Projector lamps, Chief (ceiling mounts, poles, connect kit, utility shelf, rack drawers, Large Tilt wall mounts), 34 Each: Extron (MLC 226IP Controller, HDCP compliant scaling, presentation switcher, HDMI Transmitter, 70V Amplifier, 2-Way Ceiling Speakers) 24 X 2003 Spectrum Inspiration Carts, 10 X Spectrum 55243CHBDH Media Lecterns, 36 X Liberty wall plates, 26X Cisco Small Business SG200-08 Switch, 34 X Samsung Blu-Ray Player, 34X Shure 12" Gooseneck Condenser Mic Podium & Shure Wireless Lavalier Mic System Digital.

Services: Updated/upgraded present equipment in order to have cutting edge technology, Set up beautiful appearance but very knowledgeable system for visitors, staff & students.

REFERENCE FORM

Contact Name: Lendon Balch
Company Name: Desoto County Schools
Address: 5 East South Street
Phone: 662-449-7100
Email: lendon.balch@dcsms.org
Project Start Date: 12/05/2019
Project End Date: 01/17/2020
Project Budget: \$361,445.40

Project Name: Classroom Technologies 2019/2020 Contract

Products (159) each: Epson 695WI interactive projectors with mounts, 5 Year extended warranty on each projector, Projector lamps, Kramer cables, programming, and installation.

Services: Updated/upgraded present equipment in order to have cutting edge technology, Set up beautiful appearance but very knowledgeable system for visitors, staff & students.

REFERENCE FORM

Contact Name: Butch Lee

Company Name: City of Brandon Amphitheater

Address: Boyce Lane, Brandon MS 39042

Phone: (601) 825-5021

Email: blee@ci.brandon.ms.us

Project Start Date: 02/17/2018

Project End Date: 04/19/2018

Project Budget: \$ 382,994.00

Project Name: Brandon Amphitheater

Products: Audio/Visual Equipment Crestron control systems and touch panels, Listen Technologies assistive listening equipment, West Penn Wire, Full range pendant speakers, Chief mounts, racks, and surge, Clear-Com Intercom system, 47"-80- professional LED displays, HD Video Encoder, broadcast panel, miscellaneous cables and installation supplies, Labor and Programming.

Maintenance: Before each concert we test all equipment to make sure everything is in excellent working order.

Services Installation of audio-visual equipment.



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

02/01/2019

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an **ADDITIONAL INSURED**, the policy(ies) must have **ADDITIONAL INSURED** provisions or be endorsed. If **SUBROGATION IS WAIVED**, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER Renasant Insurance, Inc. 962 Hwy. 51 N Madison MS 39110	CONTACT NAME: Millicent Williams PHONE (A/C, No, Ext): (601) 853-4605 FAX (A/C, No): (601) 605-4613 E-MAIL ADDRESS: INSURER(S) AFFORDING COVERAGE INSURER A: Continental Casualty Company INSURER B: Accident Fund Insurance Co of America INSURER C: INSURER D: INSURER E: INSURER F:	NAIC # 20443 10166
INSURED ACADEMIC TECHNOLOGIES, INC 209 A & B INDUSTRIAL DR. RIDGELAND MS 39157		

COVERAGES**CERTIFICATE NUMBER:** CL1851642196**REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:			2097755561	05/08/2018	05/08/2019	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 300,000 MED EXP (Any one person) \$ 10,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMP/OP AGG \$ 2,000,000 EPLI \$ 10,000
A	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input checked="" type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> NON-OWNED AUTOS ONLY			2097755561	05/08/2018	05/08/2019	COMBINED SINGLE LIMIT (Ea accident) \$ BODILY INJURY (Per person) \$ 1,000,000 BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
A	<input checked="" type="checkbox"/> UMBRELLA LIAB <input type="checkbox"/> EXCESS LIAB DED <input checked="" type="checkbox"/> RETENTION \$ 10,000 OCCUR CLAIMS-MADE			6016996892	05/08/2018	05/08/2019	EACH OCCURRENCE \$ 4,000,000 AGGREGATE \$ 4,000,000 \$
B	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below Y / N <input type="checkbox"/>		N / A	WCV6120129-03	12/01/2018	12/01/2019	PER STATUTE <input type="checkbox"/> OTH-ER <input type="checkbox"/> E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000
A	BBP PERSONAL PROPERTY			2097755561	05/08/2018	05/08/2019	Deductible \$500 \$87,875

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

CERTIFICATE HOLDER**CANCELLATION**

Proof Of Insurance

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

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State of Mississippi

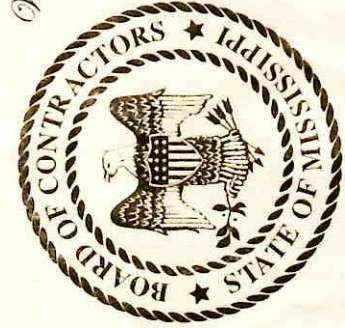
BOARD OF CONTRACTORS

ACADEMIC TECHNOLOGIES, INC.
209 A INDUSTRIAL DR.
RIDGELAND, MS 39157

ACTIVE

is duly registered and entitled to perform

COMMUNICATION SYSTEMS AND LOW VOLTAGE ELECTRICAL



We have hereunto set our hand and caused the Seal of the Mississippi Board of Contractors to be affixed this 14 day of Jan., 2021

CERTIFICATE OF RESPONSIBILITY

No. 17471-SC

Expires Jan. 14, 2022

Joel A. Canall,

CHAIRMAN OF THE BOARD

72-606-07-1-1-000 Rev. 08/07

STATE TAX COMMISSION
JACKSON, MISSISSIPPI

State of Mississippi

NOT TRANSFERABLE

PERMIT TO ENGAGE IN BUSINESS OF SELLING TANGIBLE PERSONAL PROPERTY OR SERVICES TAXABLE UNDER THE SALES TAX LAW

This permit is issued as provided by Section 27-65-27, Mississippi Code of 1972, upon condition that the holder shall pay all taxes accruing under the provisions of this act and shall keep adequate records, including daily sales and all purchase invoices. These records shall be open for inspection by any authorized agent of the State Tax Commissioner. Failure to keep such records and to pay the sales tax due under this chapter shall be cause for revocation of this permit. Please make all sales tax reports in the name and account number shown below. This permit acts as a resale certificate and authorizes the holder to purchase materials or services for resale, in the regular line of business, exempt from tax.

Issued to: ACADEMIC TECHNOLOGIES INC

Account No.: 045-15027-3

209 A INDUSTRIAL DRIVE
RIDGELAND , MS 39157

Date Issued: 04/30/08

By: JOSEPH L. BLOUNT, COMMISSIONER

This license shall not make lawful any act or thing declared to be unlawful by the State of Mississippi

ORIGINAL

Request for Taxpayer Identification Number and Certification

Give Form to the
requester. Do not
send to the IRS.

► Go to www.irs.gov/FormW9 for instructions and the latest information.

1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.
Academic Technologies Inc

2 Business name/disregarded entity name, if different from above

3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only one of the following seven boxes.

☐ Individual/sole proprietor or single-member LLC

☐ C Corporation

☒ S Corporation

☐ Partnership

☐ Trust/estate

☐ Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ►

Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is not disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.

☐ Other (see instructions) ►

4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):

Exempt payee code (if any) _____

Exemption from FATCA reporting code (if any) _____

(Applies to accounts maintained outside the U.S.)

5 Address (number, street, and apt. or suite no.) See instructions.
209 A Industrial Dr

6 City, state, and ZIP code
Ridgeland MS 39157

7 List account number(s) here (optional)

Requester's name and address (optional)

Print or type.
See Specific Instructions on page 3.

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Note: If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number

			-			-			
--	--	--	---	--	--	---	--	--	--

or

Employer identification number

2	6	-	2	4	1	9	4	7	3
---	---	---	---	---	---	---	---	---	---

Part II Certification

Under penalties of perjury, I certify that:

- 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
- I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (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
- I am a U.S. citizen or other U.S. person (defined below); and
- The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here

Signature of U.S. person ►

Philip BP

Date ►

6/30/2021

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9.

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (interest earned or paid)

- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.