

W9



## Request for Taxpayer ID Number and Certification

(if you need instructions for this document, [these are on the IRS website.](#))

Most individuals only need to complete lines 1, 3, 5 and 6, enter your social security number and sign.

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

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
- Single-member LLC
- C Corporation
- S Corporation
- Limited Liability company
- Partnership
- Trust/Estate
- Other

If you checked 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.

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

6. City, State and Zip



## 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](#). For other entities, it is your employer identification number (EIN).

If you do not have a number, see [How to get a TIN](#).

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.

## Certification

**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 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**
- 3. I am a U.S. citizen or other U.S. person (defined below); and**
- 4. 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](#).**

**The Internal Revenue Service does not require your consent to any provision of this document other than the certifications required to avoid backup withholding.**

X \_\_\_\_\_



# Signature Certificate

Document name: W9

Unique Document ID: F895689D67D32D70147E2A82652BBDB39FB65900

LEGALLY SIGNED USING  
**WP**Signature  
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## Timestamp

## Audit

December 7, 2022 4:07 pm PDT	W9 Uploaded by Jennifer Blair - help@retirementprospects.com IP 73.162.175.116
December 7, 2022 5:00 pm PDT	Lisa Johnson - manager@seniorleads.com added by Jennifer Blair - help@seniorleads.com as a CC'd Recipient Ip: 73.71.69.111
December 7, 2022 5:04 pm PDT	Lisa Johnson - manager@seniorleads.com added by Jennifer Blair - help@seniorleads.com as a CC'd Recipient Ip: 73.71.69.111
December 8, 2022 11:15 am PDT	Lisa Johnson - manager@seniorleads.com added by Jennifer Blair - help@seniorleads.com as a CC'd Recipient Ip: 73.71.69.111
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December 8, 2022 11:17 am PDT	Lisa Johnson - manager@seniorleads.com added by Jennifer Blair - help@seniorleads.com as a CC'd Recipient Ip: 73.71.69.111
December 16, 2022 10:01 am PDT	Lisa Johnson - manager@seniorleads.com added by Jennifer Blair - help@seniorleads.com as a CC'd Recipient Ip: 73.71.69.111
December 16, 2022 10:01 am PDT	Bob Richards - bobrichards@seniorleads.com added by Jennifer Blair - help@seniorleads.com as a CC'd Recipient Ip: 73.71.69.111
January 25, 2023 9:30 am PDT	Lisa Johnson - manager@seniorleads.com added by Jennifer Blair - help@seniorleads.com as a CC'd Recipient Ip: 73.71.69.111
January 25, 2023 9:30 am PDT	Bob Richards - bobrichards@seniorleads.com added by Jennifer Blair - help@seniorleads.com as a CC'd Recipient Ip: 73.71.69.111
March 10, 2023 1:51 pm PDT	Lisa Johnson - manager@seniorleads.com added by Jennifer Blair - help@seniorleads.com as a CC'd Recipient Ip: 73.71.69.111
March 10, 2023 1:51 pm PDT	Bob Richards - bobrichards@seniorleads.com added by Jennifer Blair - help@seniorleads.com as a CC'd Recipient Ip: 73.71.69.111
March 11, 2023 3:43 pm PDT	Lisa Johnson - manager@seniorleads.com added by Jennifer Blair - help@seniorleads.com as a CC'd Recipient Ip: 73.71.69.111
March 11, 2023 3:43 pm PDT	Bob Richards - bobrichards@seniorleads.com added by Jennifer Blair - help@seniorleads.com as a CC'd Recipient Ip: 73.71.69.111
April 17, 2023 1:40 pm PDT	Lisa Johnson - manager@seniorleads.com added by Jennifer Blair - help@seniorleads.com as a CC'd Recipient Ip: 73.71.69.111
April 17, 2023 1:40 pm PDT	Bob Richards - bobrichards@seniorleads.com added by Jennifer Blair - help@seniorleads.com as a CC'd Recipient Ip: 73.71.69.111

July 15, 2024 11:44 am PDT	Lisa Johnson - manager@seniorleads.com added by Jennifer Blair - help@seniorleads.com as a CC'd Recipient Ip: 73.252.165.197
July 15, 2024 11:44 am PDT	Bob Richards - bobrichards@seniorleads.com added by Jennifer Blair - help@seniorleads.com as a CC'd Recipient Ip: 73.252.165.197
December 24, 2024 11:01 am PDT	Lisa Johnson - manager@seniorleads.com added by Jennifer Blair - help@retirementprospects.com as a CC'd Recipient Ip: 15.204.73.228
December 24, 2024 11:01 am PDT	Bob Richards - bobrichards@seniorleads.com added by Jennifer Blair - help@retirementprospects.com as a CC'd Recipient Ip: 15.204.73.228
February 15, 2025 2:05 pm PDT	Lisa Johnson - manager@retirementprospects.com added by Jennifer Blair - help@retirementprospects.com as a CC'd Recipient Ip: 73.162.100.104
February 15, 2025 2:05 pm PDT	Bob Richards - bobrichards@retirementprospects.com added by Jennifer Blair - help@retirementprospects.com as a CC'd Recipient Ip: 73.162.100.104



This audit trail report provides a detailed record of the online activity and events recorded for this contract.

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