



WALLACE COMMUNITY COLLEGE - DOTHAN

**Bid #: 1609
HVAC Simulators**

Issue Date: Thursday, December 21, 2023

Due Date: Tuesday, January 16, 2023 at 3:00 PM CST

Mail or Submit to:

Wallace Community College – Dothan
Business Affairs Office
1141 Wallace Drive
Dothan, AL 36303

Direct all bid inquiries to:

Joley Anderson
Purchasing Agent
Phone: 334-556-2288
Email: janderson@wallace.edu



BID INSTRUCTIONS

ADMINISTERED BY:

Linda C. Young, President

Marc Nicholas, Dean of Business Affairs

1. The price(s) submitted should include any associated costs such as any labor, equipment, transport/delivery charges, training materials, etc.
2. No price shall include state tax or federal excise tax. Exemption letter furnished upon request.
3. All forms must be completed in ink and signed/initialed/notarized/witnessed where required. Pencil will not be accepted.
4. Must be submitted in a sealed envelope using the forms provided and clearly indicate the bid number, bid name, and opening date on the outside of the return envelope.
5. If a requested item or service cannot be furnished as specified, a substitute may be made by giving full description of the item or service being bid.
6. Correction of errors in evaluation factors will not be allowed after bid opening. However, the College reserves the right to waive or allow correction of technical errors in accordance with Alabama Code, Section 41-4-132.
7. The Beason-Hammon Alabama Taxpayer and Citizen Protection Act (Act 2011-535) requires that, as a condition for the award of a contract by a government agency to a business entity or employer with one or more employees working in Alabama, **the business entity or employer must provide documentation of enrollment in the E-Verify program**. During the performance of the contract, the business entity or employer shall participate in the E-Verify program and shall verify every employee that is required to be verified according to the applicable federal rules and regulations. If you do not believe these requirements are applicable to your entity, include an explanation justifying such exemption. An entity can obtain the E-Verify Memorandum of Understanding upon completion in the E-Verify enrollment process located at the Federal website www.e-verify.gov. The Alabama Department of Homeland Security <http://immigration.alabama.gov> has also established an E-Verify employer agent account for any business entity or employer with 25 or fewer employees that will provide a participating business entity or employer with the required documentation of enrollment in the E-Verify program. An Employee Identification Number (EIN) also known as a Federal Tax Identification Number, is required to enroll in E-Verify or to establish an E-Verify employer agent account. **The contractor's E-Verify Memorandum of Understanding must be supplied before contract award.**
8. Bids *exceeding* \$10,000.00 must include a Bid Bond for 5% of total bid, provided that bonding is available for included services, equipment, or materials. The Bid Bond must be furnished **prior** to contract award. **A Cashier's Check made payable to Wallace Community College – Dothan for 5% of the total bid amount may be substituted in lieu of a bid bond.** For vendors who are not awarded the contract, the cashier's check will be returned with the rejection letter. For the vendor(s) who are awarded the contract, the cashier's check will be returned upon contract completion.



BID AGREEMENT

ADMINISTERED BY:
Linda C. Young, President
Marc Nicholas, Dean of Business Affairs

A. OBJECTIVE

Wallace Community College – Dothan (WCCD) is seeking bids from qualified and experienced technical education training equipment dealers to provide various HVAC training and simulation equipment as specified herein for use in our Air Conditioning and Refrigeration Programs.

B. GENERAL VENDOR REQUIREMENTS

The successful bidder must:

- 1) Have sufficient capability and capacity to provide the materials and full scope of services requested herein.
- 2) Provide all materials, labor, equipment and supplies necessary to execute the Contract.
- 3) Attend meetings, if necessary, with College representatives, which may include a pre-bid meeting, pre-contract meeting, and occasional progress meetings. The date, time and location of these meetings will be provided as scheduled.
- 4) Provide list of subcontractors, if any, to be used during the Contract for the College's review and approval.

C. BID SPECIFICATIONS / SCOPE OF WORK

1) Mini Split-Type Heat Pump Trainer – (Qty 2):

Specifics:

- a. Cooling Capacity: 15,000 BTU/H
- b. Heating Capacity: 18,000 BTU/H
- c. S.E.E.R: 20.6
- d. Moisture Removal: 0.8 L/h
- e. Speeds: 3 + Automatic
- f. Compressor: Swing Type
- g. Evaporator: Finned coil with centrifugal fan
- h. Refrigerant: R-410A
- i. Metering Device: Electronic Expansion Valve
- j. Air Circulation: 568 CUft./Min (high)
- k. Timer: 24-hour clock with ON/Off programmer timer
- l. Controls: Microprocessor
- m. Thermostat: Integrated Circuit

2) Heat Pump Trainer with Bluetooth Manifold & Monitor – (Qty 2):

Specifics:

- a. Fused main disconnect switch
- b. Compressor Contactor

- c. Capacitor
- d. Low pressure switch
- e. Heater relay with circuit board (2)
- f. Heater Overloads (3)
- g. Defrost Sensor
- h. Defrost circuit board
- i. Variable speed blower
- j. Static pressure regulating damper
- k. Low voltage heat pump control transformer
- l. Thermostat
- m. Four-way reversing valve
- n. High pressure switch
- o. Fan control
- p. Programmable heat pump thermostat
- q. RTD element
- r. 6 electrical faults

3) Digital Heat Pump Simulator with Laptop – (Qty 2):

Specifics:

- a. Schematic and pictorial test points
- b. Specification chart
- c. Improper equipment use warning
- d. Component isolate switch
- e. Service switch disconnect/connect
- f. Malfunction indication
- g. Windows digital control system
- h. Gas suction and discharge pressures
- i. Two-step indoor thermostat
- j. Outdoor building thermostat
- k. Dynamic temperature variation, adjustable outdoor temperature
- l. Ohmmeter/line voltage interlock
- m. Outdoor coil thermostat
- n. Supply air temperature monitor
- o. Light identified motor/relay action
- p. Active inside temperature indicator
- q. Refrigerant (charge) control
- r. Two different motor types
- s. High pressure cut-out switch
- t. Pentium desktop computer system

4) Intermediate HVAC Electricity Trainer – (Qty 2):

Specifics:

- a. Allows students to wire actual heating and cooling control components into realistic electrical circuits
- b. The ability for the instructor to insert up to 15 faults to provide the students with troubleshooting experience
- c. Pilot lights to simulate the compressor, resistance heater and the blower fan motors
- d. Input power standard 120V AC 1Ø 60 Hz
- e. Able to be mounted on a mobile frame

D. SPECIFICATION VARIATION

Please list below any variations from the stated specifications:

E. EVALUATION FACTORS

- 1) Pricing: Bidders should submit a fixed total price that fully considers all specifications in Section C. The pricing each bidder lists below should not include sales tax and should include all applicable costs such as labor, equipment, materials, transport/delivery charges, training materials/services, etc. Bidders should consider any possible fluctuation of these applicable costs in their pricing.

FULL FIXED PRICE FOR:

Mini-split heat pump demonstrators – (Qty 2)

\$ _____ for both

FULL FIXED PRICE FOR:

Heat pump trainers with Bluetooth manifold & monitor – (Qty 2)

\$ _____ for both

FULL FIXED PRICE FOR:

Heat pump simulators with laptops – (Qty 2)

\$ _____ for both

FULL FIXED PRICE FOR:

Intermediate electricity trainers – (Qty 2)

\$ _____ for both

- 2) Availability: Bidders should submit the total time it will take to fulfill the contract, taking into consideration any possible supply chain delays.

TOTAL TIME TO FULFILL:

_____ weeks

Failure to respond to the Evaluation Factors above may result in a bid package being declared nonresponsive.

F. EVALUATION SCALE

The bid providing the best overall cost and availability to the College will be awarded the contract using the following criteria:

1) Price	70%
2) Availability	30%
Total: 100%	

Proposals will be ranked in order from least cost/most beneficial to the College to the highest cost/least beneficial to the College in each attribute.

G. BID SCHEDULE

The table below shows the intended schedule for this bid, which the College will make every effort to adhere to.

Event	Responsibility	Day, Date and Time
Issue Bid/RFP	The College	Thursday, December 21, 2023
Submit Written Questions	Vendor	Thursday, January 4, 2023 by 12:00 PM CST
Response to Written Questions	The College	Monday, January 8, 2023
Submit Bid/Proposal	Vendor	Tuesday, January 16, 2023 by 3:00 PM CST
Contract Award	The College	TBD
Contract Effective Date	The College	Thursday, January 18, 2023

H. BID QUESTIONS

Upon review of the bid documents, Vendors may have questions to clarify or interpret the bid in order to submit the best bid possible. Vendors should submit any such questions by the above due date.

Written questions should be emailed to janderson@wallace.edu by the date/time specified above. Vendors should enter "Bid #1609: Questions" as the subject for the email. Questions should include reference to the applicable bid section.

Questions received prior to the submission date, the College's response(s), and any additional terms deemed necessary by the College will be posted in the form of an addendum to the College's Bid Solicitation webpage <https://www.wallace.edu/about/bid-solicitation/> and shall become an Addendum to this bid. No information, instruction or advice provided orally or informally by any College personnel, whether made in response to a question or otherwise in connection with the bid, should be considered authoritative or binding. Vendors should rely only on written material contained in an Addendum to this bid.

I. BID SUBMITTAL

Vendors shall bear the risk for late submission due to unintended or unanticipated delay, or technical issue. It is the Vendor's sole responsibility to ensure its proposal has been received by the College by the specified date and time of opening. Any bid received or attempted to be submitted after the deadline will be rejected.

All bids should be submitted in a *sealed* envelope with the bid number, bid name, and opening date clearly marked on the outside of the envelope. Bids can be submitted by mail or in person at Wallace Community College – Dothan, Business Office, 1141 Wallace Drive, Dothan, AL 36303.

Critical updates may be included in Addenda to this bid. It is important that all participating Vendors periodically check the College's Bid Solicitation webpage <https://www.wallace.edu/about/bid-solicitation/> for any Addenda that may be issued prior to the proposal due date. All Vendors shall be deemed to have read and understood all information in this bid and all Addenda thereto. Bid submissions shall be in accordance with the terms and conditions herein and any addenda issued hereafter.

J. BID SUBMITTAL CONTENTS

Below are the requirements necessary for a complete bid packet. These requirements include any authorized signatures where requested. Vendor submissions should include the following items and should be arranged in the following order.

- 1) **Bid Agreement**: The Bid Agreement must include all pages (pp. 1-8) of this bid document with completion of Specification Variation in Section D, if any, Evaluation Factor(s) in Section E, and Acknowledgement/Certification in Section O that requires authorized signature and notary.

- 2) Vendor Contact Form (Enclosure A): Include company name, physical address, mailing address, company phone number, the authorized representative's name, title, direct phone number and email address.
- 3) Disclosure Statement (Enclosure B): Completed, signed, and notarized
- 4) Beason-Hammon (Enclosure C): Completed, signed, and witnessed
- 5) W9 Tax Form (Enclosure D): Completed and signed
- 6) E-Verify MOU: Include a copy of your E-Verify Memorandum of Understanding (MOU). See instructions on Page 2, Bid Instructions
- 7) Bid Bond or Cashier's Check: See instructions on Page 2, Bid Instructions

K. CONTRACT ADMINISTRATION/TERM

The terms of the Contract shall begin at the time of contract award.

L. FINANCIAL TERMS

Payment to the Vendor will be made after the completion of service and after submission of an invoice by the Vendor. The Vendor shall provide any administrative documentation required such as disclosure statements, tax identification forms, etc. necessary for the successful processing of payment.

M. TERMINATION

The College reserves the right to terminate the Contract for non-performance should the Vendor not meet the criteria of the Contract. If the Vendor does not meet the Contract requirements, the College will issue a cure notice specifying the deficiencies and allowing a time for correction (normally 10 days). If the deficiencies are not corrected in the time frame specified, the College may terminate the Contract. Either party reserves the right to terminate this contract with a 90-day notice.

N. RIGHT TO AWARD

The College reserves the right to award this contract, or any portion of this contract, to a successful bidder, to negotiate with any or all bidders, to reject, accept and/or reconcile technical errors and to make any other decision which is considered in the best interest of the College in accordance with the provisions of The Code of Alabama 1975, Section 41-4-132. This contract will not be awarded solely on the basis of lowest price offered, but on the best overall value, quality and timeliness for the College.

O. ACKNOWLEDGMENT/CERTIFICATION

By executing this bid, the undersigned certifies to all of the following and acknowledges the contract may be declared void if it is discovered these certifications are false:

- 1) In compliance with Alabama Code 41-16-5, the contractor hereby certifies that it is not currently engaged in, and will not engage in, the boycott of a person or an entity based in, or doing business with, a jurisdiction with which this State can enjoy open trade.
- 2) As required by Alabama Code 41-4-142, the undersigned certifies to the best of the vendor's knowledge and belief, that it and its principals are not presently debarred, suspended, proposed for debarment, declared ineligible or voluntarily excluded from covered transactions by any Federal or State department or agency.
- 3) As required by Alabama Code 41-4-142, the undersigned certifies that it, its contractors, or affiliates are appropriately registered to collect and remit sales and use tax, or simplified sellers use tax and lease tax.

- 4) As required by the Beason-Hammon Alabama Taxpayer and Citizen Protection Act (Act 2011-535), the undersigned vendor certifies that it, and each of its sub-contractors for any contract awarded as a result of this bid/proposal, complies with the requirements of Act 2011-535, including the requirement for each employer in Alabama to verify the work authorization of its employees through the federal E-Verify system.
- 5) I affirm I have not been in any agreement or collusion among bidders or prospective bidders in restraint of freedom of competition by agreement to bid, at a fixed price, or to refrain from bidding or otherwise.

Firm: _____ Signature: _____

Date: _____ Print Name: _____

Terms: _____ Title: _____

Address: _____

Phone: _____

Email: _____

Sworn to and subscribed before me this

_____ day of _____ 20 _____

Notary Public

My Commission Expires: _____ / _____ / _____

ENCLOSURE A: VENDOR CONTACT FORM



VENDOR CONTACT FORM

COMPANY INFORMATION

Company Name: _____

Physical Address: _____

Mailing Address: _____

Company Phone Number: _____

AUTHORIZED REPRESENTATIVE'S INFORMATION

Authorized Representative's Name: _____

Title: _____

Direct Phone Number: _____

Direct Email Address: _____

ENCLOSURE B: DISCLOSURE STATEMENT



State of Alabama Disclosure Statement

(Required by Act 2001-955)

ENTITY COMPLETING FORM

ADDRESS

CITY, STATE, ZIP

TELEPHONE NUMBER

STATE AGENCY/DEPARTMENT THAT WILL RECEIVE GOODS, SERVICES, OR IS RESPONSIBLE FOR GRANT AWARD

ADDRESS

CITY, STATE, ZIP

TELEPHONE NUMBER

This form is provided with:

☐

Contract

☐

Proposal

☐

Request for Proposal

☐

Invitation to Bid

☐

Grant Proposal

Have you or any of your partners, divisions, or any related business units previously performed work or provided goods to any State Agency/Department in the current or last fiscal year?

☐

Yes

☐

No

If yes, identify below the State Agency/Department that received the goods or services, the type(s) of goods or services previously provided, and the amount received for the provision of such goods or services.

STATE AGENCY/DEPARTMENT

TYPE OF GOODS/SERVICES

AMOUNT RECEIVED

Have you or any of your partners, divisions, or any related business units previously applied and received any grants from any State Agency/Department in the current or last fiscal year?

☐

Yes

☐

No

If yes, identify the State Agency/Department that awarded the grant, the date such grant was awarded, and the amount of the grant.

STATE AGENCY/DEPARTMENT

DATE GRANT AWARDED

AMOUNT OF GRANT

1. List below the name(s) and address(es) of all public officials/public employees with whom you, members of your immediate family, or any of your employees have a family relationship and who may directly personally benefit financially from the proposed transaction. Identify the State Department/Agency for which the public officials/public employees work. (Attach additional sheets if necessary.)

NAME OF PUBLIC OFFICIAL/EMPLOYEE

ADDRESS

STATE DEPARTMENT/AGENCY

OVER

2. List below the name(s) and address(es) of all family members of public officials/public employees with whom you, members of your immediate family, or any of your employees have a family relationship and who may directly personally benefit financially from the proposed transaction. Identify the public officials/public employees and State Department/Agency for which the public officials/public employees work. (Attach additional sheets if necessary.)

NAME OF FAMILY MEMBER	ADDRESS	NAME OF PUBLIC OFFICIAL/ PUBLIC EMPLOYEE	STATE DEPARTMENT/ AGENCY WHERE EMPLOYED
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If you identified individuals in items one and/or two above, describe in detail below the direct financial benefit to be gained by the public officials, public employees, and/or family members as the result of the contract, proposal, request for proposal, invitation to bid, or grant proposal. (Attach additional sheets if necessary.)

Describe in detail below any indirect financial benefits to be gained by any public official, public employee, and/or family members of the public official or public employee as the result of the contract, proposal, request for proposal, invitation to bid, or grant proposal. (Attach additional sheets if necessary.)

List below the name(s) and address(es) of all paid consultants and/or lobbyists utilized to obtain the contract, proposal, request for proposal, invitation to bid, or grant proposal.

NAME OF PAID CONSULTANT/LOBBYIST	ADDRESS
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By signing below, I certify under oath and penalty of perjury that all statements on or attached to this form are true and correct to the best of my knowledge. I further understand that a civil penalty of ten percent (10%) of the amount of the transaction, not to exceed \$10,000.00, is applied for knowingly providing incorrect or misleading information.

Signature	Date
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Notary's Signature	Date	Date Notary Expires
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Act 2001-995 requires the disclosure statement to be completed and filed with all proposals, bids, contracts, or grant proposals to the State of Alabama in excess of \$5,000.

ENCLOSURE C: BEASON-HAMMON

State of _____

County of _____

CERTIFICATE OF COMPLIANCE WITH THE BEASON-HAMMON ALABAMA TAXPAYER AND CITIZEN PROTECTION ACT (ACT 2011-535, as amended by Act 2012-491)

RE Contract/Grant/Incentive (describe by number or subject): _____ by and
between _____ (Contractor/Grantee)
and _____ (State Agency or Department or other Public Entity)

The undersigned hereby certifies to the State of Alabama as follows:

1. The undersigned holds the position of _____ with the Contractor/Grantee named above, is authorized to provide the representations that are set out in this Certificate as the official and binding act of that entity, and has knowledge of the provisions of THE BEASON-HAMMON ALABAMA TAXPAYER AND CITIZEN PROTECTION ACT (ACT 2011-535 of the Alabama Legislature, as amended by Act 2012-491) which is described herein as "the Act".
2. Applying the following definitions from the Section 3 of the Act, the Contractor/Grantee business structure is as indicated by my initials.

BUSINESS ENTITY. Any person or group of persons employing one or more persons performing or engaging in any activity, enterprise, profession, or occupation for gain, benefit, advantage, or livelihood, whether for profit or not for profit. "Business entity" shall include, but not be limited to the following:

- a. Self-employed individuals, business entities filing articles of incorporation, partnerships, limited partnerships, limited liability companies, foreign corporations, foreign limited partnerships, foreign limited liability companies authorized to transact business in this state, business trusts, and any business entity that registers with the Secretary of State.
- b. Any business entity that possesses a business license, permit, certificate, approval, registration, charter, or similar form of authorization issued by the state, any business entity that is exempt by law from obtaining such a business license, and any business entity that is operating unlawfully without a business license.

EMPLOYER. Any person, firm, corporation, partnership, joint stock association, agent, manager, representative, foreman, or other person having control or custody of any employment, place of employment, or of any employee, including any including any person or entity employing any person for hire within the State of Alabama, including a public employer. This term shall not include the occupant of a household contracting with another person to perform casual domestic labor within the household.

_____ a. The Contractor/Grantee is a business entity or employer as those terms are defined in Section 3 of the Act.

_____ b. The Contractor/Grantee is not a business entity or employer as those terms are defined in Section 3 of the Act.

3. As of the date of this Certificate, Contractor/Grantee does not knowingly employ an unauthorized alien, as that term is defined in Section 3 of the Act, within the State of Alabama and hereafter it will not knowingly employ, hire for employment, or continue to employ an unauthorized alien within the State of Alabama.

{Alien is any person who is not a citizen or national of the United States, as described in 8 U.S.C. § 1101, et seq., and any amendments thereto.}

{Unauthorized Alien is an alien who is not authorized to work in the United States as defined in 8 U.S.C. § 1324a(h)(3).}

4. Contractor/Grantee is enrolled in E-Verify unless {initial the following selections which apply}:

_____ (a) it is not eligible to enroll because of the rules of that program or other factors beyond its control.

_____ (b) it is excused from the requirement of enrollment in E-Verify because it does not have an employee in the State of Alabama.

Certified this _____ day of _____ 20_____.

Name of Contractor/Grantee/Recipient

By: _____

Its _____

The above Certification was signed in my presence by the person whose name appears above, on
this _____ day of _____ 20_____.

WITNESS _____

Print Name of Witness

ENCLOSURE D: W-9 TAX FORM

Form **W-9**
(Rev. October 2018)
Department of the Treasury
Internal Revenue Service

Request for Taxpayer Identification Number and Certification

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

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

Print or type. See Specific Instructions on page 3.	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. <input type="checkbox"/> Individual/sole proprietor or single-member LLC <input type="checkbox"/> 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. <input type="checkbox"/> 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) _____ <i>(Applies to accounts maintained outside the U.S.)</i>
	5 Address (number, street, and apt. or suite no.) See instructions.	Requester's name and address (optional)
	6 City, state, and ZIP code	
	7 List account number(s) here (optional)	

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									
				-					

Part II 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, later.

Sign Here	Signature of U.S. person ►	Date ►
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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.