BLACK HORSE PIKE REGIONAL SCHOOL DISTRICT BOARD OF EDUCATION REQUESTS FOR PROPOSALS

Notice is hereby given that pursuant to the provisions of N.J.S.A. 19:44A-20, New Jersey Pay to Play, and other legislative enactments, more specifically Chapter 271 of the laws of the State of New Jersey, the Black Horse Pike Regional School District Board of Education located at 580 Erial Road, Blackwood, New Jersey 08012 is seeking RFP's for professional services to be provided to the Board of Education as listed below for the period July 1, 2025 to June 30, 2026.

Requests for proposals as attached are on file at the Board Secretary/Business Administrator's office at 580 Erial Road, Blackwood, New Jersey 08012, and may also be downloaded from the Board of Education's website.

PHYSICIAN

Scope of Services:

The Black Horse Pike Regional Board of Education desires to appoint a School Physician who will be a primary resource to provide emergency medical attention as required for students and employees of the Black Horse Pike Regional Board of Education and regular care and services including but not limited to student physical exams and screenings, athletic examinations, referral services for employees, consultations and review services in the development of district policies and procedures related to health, safety and emergency medical care, as well as, attend all football games and other events or be able to arrange for said coverage, as required in order to provide on the spot first aid. Applicants should demonstrate knowledge and experience serving as physicians for governmental entities. Any experience of knowledge of matters that directly affect the Black Horse Pike Regional Board of Education should be addressed.

Mandatory Minimum Qualifications:

- 1. Familiar with the School District and requirements of the Department of Education concerning School Physicians.
- 2. Licensed to practice medicine in the State of New Jersey for a minimum of three (3) years prior to appointment.
- 3. Must have a minimum of three (3) years' experience in treatment and care as it relates to occupational health issues.
- 4. Must have demonstrated experience in dealing with issues particular to the fitness of public employees.
- 5. Must have sufficient staff to perform all clerical functions required by a governmental entity of its appointed physician.
- 6. Must have an office in close proximity to Gloucester Township for the purpose of providing prompt access for school employees and students.
- 7. Must provide proof of medical malpractice insurance.
- 8. Provide a list of any professional affiliations and provide listing of possible covering physicians.
- 9. Must be able to review and assess requests for home instruction services, which may include making medical determinations and consultation with other physicians.

All statements of proposals for professional service contracts shall include at a minimum the following information.

- 1. Names of individuals who will perform required tasks as well as the listing of their licenses.
 - A. Identify the person who will be primarily responsible for the services required by the Board of Education and provide a description of the experience of the primary person with projects and issues similar to those more specifically set forth in this RFP's and on behalf of the Board of Education of the Black Horse Pike Regional School District.
 - B. Identify persons who will serve as back up to the primary person including resumes of all parties.
- 2. Describe ability to provide services in a timely fashion including a description of your staffing and a description of your familiarity with the services required by the Board of Education of the Black Horse Pike Regional School District.

Evaluation of Proposals:

The School District intends to award a professional services contract for the defined scope of work under the Fair and Open Process in accordance with N.J.S.A. 19:44A-20.4 et seq.

The proposals will be evaluated by a committee of School District staff based upon information supplied by each Proposer in response to this RFP and the following criteria:

- · Ability to meet all minimum qualifications.
- · Overall knowledge and familiarity with the operations of the School District.
- Experience of the firm in providing similar services to other public bodies, with special emphasis on experience in New Jersey.
- · Qualifications and experience of the professional.
- Qualifications and experience of the other members of the professional's firm.
- The hourly rates proposed. The proposal shall identify whether clerical and other overhead costs will be billed separately or included in the hourly labor rate for the professionals.

Any questions regarding this Request for Proposals should be directed to Mr. Scott Kipers, School Business Administrator of the Black Horse Pike Regional School District.

Please submit two (2) copies of the proposal to:

Black Horse Pike Regional School District 580 Erial Road Blackwood, New Jersey 08012 856-227-4106

All RFP's must be received at the School District's Administrative Office by 12:00 pm. on **Friday, May 9, 2025** at which time they will be publicly opened.

AFFIRMATIVE ACTION QUESTIONNAIRE

This form is to be completed and returned with the bid. However, the Board will accept in lieu of this Questionnaire, Affirmative Action Evidence Employee Information Report.

1. Our company has a federal Affirmative Action Plan approval.

If yes, please attach a copy of the plan to this questionnaire.

If yes, please attach a copy of the certificate to this questionnaire.

3. If you answered "NO" to both questions No.1 and 2, you must apply for an Affirmative Action Employee Information Report - Form AA302.

Please visit the New Jersey Department of Treasury website for the Division of Public Contracts Equal Employment Opportunity Compliance: www.state.nj.us/treasury/contractcompliance/

- · Click on "Employee Information Report"
- Complete and submit the form with the appropriate payment to:

Department of Treasury
Division of Public Contracts/EEO Compliance
P.O. Box 209
Trenton, NJ 08625-0002

All fees for this application are to be paid directly to the State of New Jersey. A copy shall be submitted to the Board of Education within seven (7) days of the notice of the intent to award the contract or the signing of the contract.

I certify that the above information is correct to the best of my knowledge.

Name		
Signature		
Title	Date	
Name of Company		
Address		
City, State, Zip		

STOCKHOLDER/PARTNERSHIP DISCLOSURE AND STATEMENT OF OWNERSHIP

Re: Proposal for the Black Horse Pike Regional Board of Education.

Proposal Date:					
Pleas	e check one	type of Ownership. comple	ete th	e form. and execute w	here provided.
					-
	Corporation			Limited Partnership	
	Partnership		<u>u</u>	Limited Liability Co.	rp
	Sole Propri	etorship		Limited Liability Par	tnership
<u> </u>	Sub Chapte	er S Corp		Other	
state composition own until estal	work or the fit or any count mission whice oration or sainership who corporation for grown and a blished in this same and a blished in this same and a same and a blished in this same and a same and a blished in this same and a same and a blished in this same and a same and a blished in this same and a same and a blished in this same and a same a s	urnishing of any material of ty, municipality or school hexercises governmental departmentally of partnership, there is substantially or greater interest partnership", the stockhold reater interest in that partnership defresses of every non-corps act, has been listed. **CORY THAT THIS FOR the partner of the percent or more of the percent or	or supdistrifunct mittenst the der he ership porat	poplies, the cost of whice ct, or any subsidiary of ions, unless prior to the dastatement setting for erein, as the case may olding 10% or more of p, as the case may be, se stockholder, and indicate COMPLETED AN.	I any agreement be entered into for the performance of h is to be paid with or out of any public funds, by the r agency of the State, or by an authority, board or e receipt of the bid or accompanying the bid of said orth the names and all individual partners in the be." If one or more such stockholder "or partner" is itself that corporation "or partnership" the individual partners shall also be listed. The disclosure shall be, continued ividual partner, exceeding the 10% ownership criteria. D SUBMITTED WITH BID. In the event that there are the bidder, then such fact should be certified below as partnership and the state of the such fact should be certified below as partnership.
	-	ny			
City	, State, Zip _			A CONTRACTOR OF THE CONTRACTOR	A STATE OF THE STA
		List of Ow	ners	with Ten Percent	(10%) or More Interest
Ow	ner's Name	Home Address	Т	itle/Office Held	Percent (%) of Partnership Shares Owned
NO	TE: If you no	eed more space than that p	rovid	ed above, please use a	n extra sheet for furnishing the
abo	ve required in	nformation for any remain	ng p	ersons or entities.	
Sig	nature				Date

(form continued on next page)

To be completed and signed below.

STOCKHOLDER/PARTNERSHIP DISCLOSURE AND STATEMENT OF OWNERSHIP (con't)

and include a list of the various principals.	
Our firm,	
Names of Principals Title	
Use additional paper if needed. Check here □ if additional sheets are attached.	
Name of Company	
Address	
City, State, Zip	
Authorized AgentTitle	

SIGNATURE OF AUTHORIZED AGENT

C. 271 POLITICAL CONTRIBUTION DISCLOSURE FORM

Required Pursuant To N.J.S.A. 19:44A-20.26

This form or its permitted facsimile must be submitted to the local unit no later than 10 days prior to the award of the contract.

The undersigned being authorized to certify, hereby certifies that the submission provided herein represents compliance with the provisions of N.I.S.A. 19:44A-20.26 and as represented by the instructions accompanying this form.					
-					
political contributions (more than \$300 per election cycle) over the 12 months prior to submission to the committees of the government entities listed on the form provided by the local unit. □ Check here if disclosure is provided in electronic form.					
compliance with the provisions of N.I.S.A. 19:44A-20.26 and as represented by the instructions accompanying this form. Signature Printed Name Title Part II - Contribution Disclosure Disclosure requirement: Pursuant to NJ.S.A. 19:44A-20.26 this disclosure must include all reportable political contributions (more than \$300 per election cycle) over the 12 months prior to submission to					

 $\ \square$ Check here if the information is continued on subsequent page(s)

C. 271 POLITICAL CONTRIBUTION DISCLOSURE FORM Contractor Instructions

Business entities (contractors) receiving contracts from a public agency that are NOT awarded pursuant to a "fair and open" process (defined at N.J.S.A. 19:44A-20.7) are subject to the provisions of P.L. 2005, c. 271, s.2 N.J.S.A. 19:44A-20.26). This law provides that 10 days prior to the award of such a contract, the contractor shall disclose contributions to:

- any State, county, or municipal committee of a political party
- · any legislative leadership committee*
- any continuing political committee (a.k.a., political action committee)
- any candidate committee of a candidate for, or holder of, an elective office:
 - of the public entity awarding the contract
 - o of that county in which that public entity is located
 - o of another public entity within that county
 - o or of a legislative district in which that public entity is located or, when the public entity is a county, of any legislative district which includes all or part of the county

The disclosure must list reportable contributions to any of the committees that exceed \$300 per election cycle that were made during the 12 months prior to award of the contract. See NJ.S.A. 19:44A-8 and 19:44A-16 for more details on reportable contributions.

NJ.S.A. 19:44A-20.26 itemizes the parties from whom contributions must be disclosed when a business entity is not a natural person. This includes the following:

- individuals with an "interest" ownership or control of more than 10% of the profits or assets of a business entity or 10% of the stock in the case of a business entity that is a corporation for profit
- all principals, partners, officers, or directors of the business entity or their spouses
- · any subsidiaries directly or indirectly controlled by the business entity
- IRS Code Section 527 New Jersey based organizations, directly or indirectly controlled by the business entity and filing as continuing political committees, (PACs).

When the business entity is a natural person, "a contribution by that person's spouse or child, residing therewith, shall be deemed to be a contribution by the business entity." [N.J.S.A. 19:44A-20.26(b)] The contributor must be listed on the disclosure.

Any business entity that fails to comply with the disclosure provisions shall be subject to a fine imposed by ELEC in an amount to be determined by the Commission which may be based upon the amount that the business entity failed to report.

The enclosed list of agencies is provided to assist the contractor in identifying those public agencies whose elected official and/or candidate campaign committees are affected by the disclosure requirement. It is the contractor's responsibility to identify the specific committees to which contributions may have been made and need to be disclosed. The disclosed information may exceed the minimum requirement.

The enclosed form, a content-consistent facsimile, or an electronic data file containing the required details (along with a signed cover sheet) may be used as the contractor's submission and is disclosable to the public under the Open Public Records Act.

The contractor must also complete the attached Stockholder Disclosure Certification. This will assist the agency in meeting its obligations under the law. **NOTE: This section does not apply to Board of Education contracts.**

'N.J.S.A. 19:44A-3(s): "The term "legislative leadership committee" means a committee established, authorized to be established, or designated by the President of the Senate, the Minority Leader of the Senate, the Speaker of the General Assembly or the Minority Leader of the General Assembly pursuant to section 16 of P.L.1993, c.65 (C.19:44A-10.1) for the purpose of receiving contributions and making expenditures."

BLACK HORSE PIKE REGIONAL BOARD OF EDUCATION

Business Office 580 Erial Road Blackwood, New Jersey 08012

Proposal Form

Title of Proposal

RFP - PHYSICIAN

The respondent by signing this proposal form, acknowledges that he/she has carefully examined the proposal specifications and documents; and further acknowledges he/she understands and is able to render the scope of activity and services outlined in the proposal.

Name		
Address	P.O. Box	
City, State, Zip Code		
Federal Tax ID Number		
Phone Number ()	Extension	
Fax No. ()	E-Mail	
Authorized Agent	Title	
Agent's Signature	Date	

All proposals must be received no later than 12:00 pm. on Friday, May 9, 2025. All proposals are to be sent to:

Mr. Scott Kipers, Business Administrator Board Secretary, Purchasing Agent 580 Erial Road Blackwood, New Jersey 08012 Phone # 856-227-4106/Fax # 856-401-8763

ETHICS IN PURCHASING Statement to Vendors

School District Responsibility

Recommendation of Purchases

It is the desire of the Black Horse Pike Regional Board of Education to have all Board employees and officials practice exemplary ethical behavior in the procurement of goods, materials, supplies, and services.

School district officials and employees who recommend purchases shall not extend any favoritism to any vendor. Each recommended purchase should be based upon quality of the items, service, price, delivery, and other applicable factors in full compliance with N.J.S.A. 18A:18A-1 et.seq.

Solicitation/Receipt of Gifts - Prohibited

School district officials and employees are prohibited from soliciting and receiving funds, gifts, materials, goods, services, favors, and any other items of value from vendors doing business with the Black Horse Pike Regional Board of Education or anyone proposing to do business with the Black Horse Pike Regional School District.

Vendor Responsibility

Offer of Gifts, Gratuities -- Prohibited

Any vendor doing business or proposing to do business with the Black Horse Pike Regional School District, shall neither pay, offer to pay, either directly or indirectly, any fee, commission, or compensation, nor offer any gift, gratuity, or other thing of value of any kind to any official or employee of the Black Horse Pike Regional School District or to any member of the official's or employee's immediate family.

Vendor Influence -- Prohibited

No vendor shall cause to influence or attempt to cause to influence, any official or employee of the Black Horse Pike Regional School District, in any manner which might tend to impair the objectivity or independence of judgment of said official or employee.

Vendor Certification

Vendors or potential vendors will be asked to certify that no official or employee of the Black Horse Pike Regional Board of Education or immediate family members are directly or indirectly interested in this request or have any interest in any portions of profits thereof. The vendor participating in this request must be an independent vendor and not an official or employee of the Black Horse Pike Regional Board of Education.

Mr. Scott Kipers
Business Administrator
Board Secretary
Purchasing Agent

NON-COLLUSION AFFIDAVIT

Re: Proposal for the Black Horse Pike Regional Boar	d of Education.
STATE OF)	Date:
COUNTY OF)	
I, of	f the City of
in the County of and	the State of
of full age, being duly sworn according to law on my	oath depose and say that:
I am	of
I amPosition in Com	apany and the bidder making executed the said Proposal with full authority so to do; that I
of this proposal with any potential bidders, or otherwise connection with the above named bid, and that all state and correct, and made with full knowledge that the Bitruth of the statements contained in said Proposal and contract for the said bid. I further warrant that no person or selling agency has been contracted to the said bid.	ement, participated in any collusion, discussed any or all parts se taken any action in restraint of free, competitive bidding in ements contained in said Proposal and in this affidavit are true lack Horse Pike Regional Board of Education relies upon the d in the statements contained in this affidavit in awarding the has been employed or retained to solicit or secure such contract on, percentage, brokerage, or contingent fee, except bona fide ling agencies maintained by
(Print Name o	of Contractor/Vendor)
Subscribed and sworn to:(SIGNATURE	E OF CONTRACTOR/VENDOR)
before me this day of Month	 Year
NOTARY PUBLIC SIGNATURE	Print Name of Notary Public
My commission expires Month Day	

To be completed, signed and returned with RFP Disclosure of Investment Activities in Iran

Person or Entity					
Part 1: Certification					
proposes to enter into perjury, that neither the State Department of T The list is found on The The Chapter 25 list m is found to be in violate contract, including b	complete Part 1 By Checking <u>Either Box.</u> w 2012, c. 25, any person or entity that is a successful bidder or proposer, or otherwise or renew a contract, must complete the certification below to attest, under penalty of the person or entity, nor any parent entity, subsidiary, or affiliate is identified on the reasury's Chapter 25 list as a person or entity engaging in investment activities in Iran. The reasury's website at www.state.nj.us/treasury/purchase/pdf/Chapter25List.pdf . The reviewed prior to completing the below certification. If a vendor or contractor attornation of law, action may be taken as appropriate and as may provided by law, rule or the unit of limited to imposing sanctions, seeking compliance, recovering damages, default and seeking debarment or suspension of the party.				
	I certify, pursuant to Public Law 2012, c. 25, that neither the person or entity listed above, nor any parent entity, subsidiary, or affiliate thereof is listed on the N.J. Department of the Treasury's list of entities determined to be engaged in prohibited activities in Iran pursuant to P.L. 2012, c. 25 ("Chapter 25 List"). I further certify that I am the person listed above, or I am an officer or representative of the entity listed above and am authorized to make this certification on its behalf. I will skip Part 2 and sign and complete the Certification below.				
OR					
	I am unable to certify as above because the person or entity and/or a parent entity, subsidiary, or affiliate thereof is listed on the N.J. Department of the Treasury's Chapter 25 list. I will provide a detailed, accurate and precise description of the activities in Part 2 below sign and complete the Certification below.				

	Part 2: Additional Inforn	nation			
PLEASE PROVID	E FURTHER INFORMATION RELATED TO	INVES'	TMENT	ACTIVITIES IN IRAN.	
parent entity, subsi	a detailed, accurate and precise description of diary, or affiliate thereof engaging in investment additional sheets provided by you.				
Pa	Part 3: Certification of True and Complete Information				
attachments there	sworn upon my oath, hereby represent and state to the best of my knowledge are true and co ication on behalf of the above-referenced perso	mplete. I	attest ti	•	
contained herein certification throuton notify the Black information contains I acknowledge misrepresentation under the law and Pike Regional Sc.	that the Black Horse Pike Regional School and thereby acknowledge that I am under a count the completion of any contracts with the Black Horse Pike Regional School District in whether the I am aware that it is a criminal of a in this certification, and if I do so, I recognize that it will also constitute a material breach of thool District and that the Black Horse Pike Regact(s) resulting from this certification void and	ntinuing ck Horse citing of effense te that I am f my agre gional Se	obligation Pike Research o make subject to eement(s	on from the date of this egional School District ages to the answers of a false statement or co criminal prosecution with the Black Horse	
<u> </u>	(,,				
Full Name (Print)		Title			
Signature			Date		



Vendor's Address (City/State/Zip Code)

CERTIFICATION OF NON-INVOLVEMENT IN PROHIBITED ACTIVITIES IN RUSSIA OR BELARUS

Pursuant to N.J.S.A. 52:32-60.1, et seq. (L. 2022, c. 3) any person or entity (hereinafter "Vendori") that seeks to enter into or renew a contract with a State agency for the provision of goods or services, or the purchase of bonds or other obligations, must complete the certification below indicating whether or not the Vendor is identified on the Office of Foreign Assets Control (OFAC) Specially Designated Nationals and Blocked Persons list available https://sanctionssearch.ofac.treas.gov/. If the Department of the Treasury finds that a Vendor has made a certification in violation of the law, it shall take any action as may be appropriate and provided by law, rule or contract, including but not limited to, imposing sanctions, seeking compliance, recovering damages, declaring the party in default and seeking debarment or suspension of the party.

I, the undersigned, certify that I have read the definition of "Vendor" below, and have reviewed the Office of Foreign Assets Control (OFAC) Specially Designated Nationals and Blocked Persons list, and having done so certify:

(Check the Appropriate Box)

That the Vendor is not identified on the OFAC Specially Designated Nationals and Blocked Persons list on account of activity related to Russia and/or Belarus. OR That I am unable to certify as to "A" above, because the Vendor is identified on the OFAC Specially Designated Nationals and Blocked Persons list on account of activity related to Russia and/or Belarus. OR That I am unable to certify as to "A" above, because the Vendor is identified on the OFAC Specially Designated Nationals and Blocked Persons list. However, the Vendor is engaged in activity related to Russia and/or Belarus consistent with federal law, regulation, license or exemption. A detailed description of how the Vendor's activity related to Russia and/or Belarus is consistent with federal law is set forth below. (Attach Additional Sheets If Necessary.) Signature of Vendor's Authorized Representative Date Print Name and Title of Vendor's Authorized Representative Vendor's FEIN Vendor's Name Vendor's Phone Number Vendor's Address (Street Address) Vendor's Fax Number

Vendor's Email Address

ⁱ Vendor means: (1) A natural person, corporation, company, limited partnership, limited liability partnership, limited liability company, business association, sole proprietorship, joint venture, partnership, society, trust, or any other nongovernmental entity, organization, or group; (2) Any governmental entity or instrumentality of a government, including a multilateral development institution, as defined in Section 1701(c)(3) of the International Financial Institutions Act, 22 U.S.C. 262r(c)(3); or (3) Any parent, successor, subunit, direct or indirect subsidiary, or any entity under common ownership or control with, any entity described in paragraph (1) or (2).

BUSINESS REGISTRATION CERTIFICATE (N.J.S.A. 52:32-44)

Pursuant to N.J.S.A. 52:32-44 as amended by P.L. 2004 – Chapter 57, all respondents shall submit with their proposal package a copy of their "New Jersey Business Registration Certificate" as issued by the Department of Treasury of the State of New Jersey. Failure to provide the New Jersey Business Registration Certification with the proposal package, or prior to the award of contract, will be cause for the rejection of the entire proposal.

INSURANCE; PROFESSIONAL LIABILITY - CERTIFICATE REQUIRED					
☐ Req	uired	☐ Not Required			
The successful respondent to whom the contract is awarded shall provide to the Board of Education with contract documents a Professional Liability Insurance Certificate with the following limits:					
	\$1,000,000 Ea \$3,000,000 A	ach Incident; Occurrence; Wrongful Act ggregate			
The insurance certific	ate name as to t	he certificate holder shall be as follows:			
		e Pike Regional Board of Education c/o The Business Office			

580 Erial Road Blackwood, NJ 08012

The insurance certificate shall remain in full force during the term of contract.

Form W-9 (Rev. December 2011) Department of the Treasury Internal Revenue Service

Request for Taxpayer Identification Number and Certification

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

	Name (as shown on your income tax return)					
ge 2.	Business name/disregarded entity name, if different from above					
Print or type See Specific Instructions on page	Check appropriate box for federal tax classification: Individual/sole proprietor Corporation Solution Partnership Trust/estate Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=partnership) Other (see instructions)					
Address (number, street, and apt. or suite no.) Requester's name and address (optional						
See Sp	City, state, and ZIP code					
	List account number(s) here (optional)					
Pa	rt I Taxpayer Identification Number (TIN)					
to av resid entiti	r your TIN in the appropriate box. The TIN provided must match the name given on the "Name rold backup withholding. For individuals, this is your social security number (SSN). However, for lent alien, sole proprietor, or disregarded entity, see the Part I instructions on page 3. For other les, it is your employer identification number (EIN). If you do not have a number, see <i>How to ge</i> on page 3.	or a	Social security number	-		
	e. If the account is in more than one name, see the chart on page 4 for guidelines on whose ber to enter.		Employer identification nu	mber		
Pa	rt II Certification					
Unde	er penalties of perjury, I certify that:					
1. Th	he number shown on this form is my correct taxpayer identification number (or I am waiting for	a numb	oer to be issued to me), ar	d		
S	am not subject to backup withholding because: (a) I am exempt from backup withholding, or (be ervice (IRS) that I am subject to backup withholding as a result of a failure to report all interest o longer subject to backup withholding, and					
3. I a	am a U.S. citizen or other U.S. person (defined below).					

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 on page 4.

Sign Signature of U.S. person ►

General Instructions

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

Purpose of Form

A person who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) to report, for example, income paid to you, real estate transactions, mortgage interest you paid, acquisition or abandonment of secured property, cancellation of debt, or contributions you made to an IRA.

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN to the person requesting it (the requester) and, when applicable, to:

- 1. Certify that the TIN you are giving is correct (or you are waiting for a number to be issued),
 - 2. Certify that you are not subject to backup withholding, or
- 3. Claim exemption from backup withholding if you are a U.S. exempt payee. If applicable, you are also certifying that as a U.S. person, your allocable share of any partnership income from a U.S. trade or business is not subject to the withholding tax on foreign partners' share of effectively connected income.

Note. If a requester gives you a form other than Form W-9 to request your TIN, you must use the requester's form if it is substantially similar to this Form W-9

Definition of a U.S. person. For federal tax purposes, you are considered a U.S. person if you are:

- An individual who is a U.S. citizen or U.S. resident alien,
- A partnership, corporation, company, or association created or organized in the United States or under the laws of the United States,
- An estate (other than a foreign estate), or

Date ▶

• A domestic trust (as defined in Regulations section 301.7701-7).

Special rules for partnerships. Partnerships that conduct a trade or business in the United States are generally required to pay a withholding tax on any foreign partners' share of income from such business. Further, in certain cases where a Form W-9 has not been received, a partnership is required to presume that a partner is a foreign person, and pay the withholding tax. Therefore, if you are a U.S. person that is a partner in a partnership conducting a trade or business in the United States, provide Form W-9 to the partnership to establish your U.S. status and avoid withholding on your share of partnership income.

