



# **North Carolina Rheumatology Association**

## **Corporate Sponsor Prospectus**

**Annual Report  
Contributor Policies  
Agenda  
Corporate Sponsor Opportunities  
Sanctioned Events Application  
W-9**

**2025 Annual Conference  
March 15 & 16  
Washington Duke Inn**

## North Carolina Rheumatology Association

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(PMB 2046)

Wilmington, NC 28403

www.ncrheum.org

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## NCRA Activities in 2024

### Education:

1. Hosted the 2024 Annual Conference on March 9-10, 2024 at The Westin Hotel, Charlotte NC. One hundred and sixteen (116) Physicians and Advanced Practice Providers from NC, VA and TN participated.
2. Hosted the 2024 Fall Summit for October 30, 2024 in New Bern (3), Durham (15), Winston-Salem (15), Charlotte (10), Asheville (14), and virtual (5). Dr Emily Austin presents on *How and Why We Should Prioritize Pleasure*.
3. Sponsored and attended the Carolina Fellows Conference dinner.
4. Supported Rheumatology Fellows Programs at Duke Medical School, UNC Chapel Hill Medical School, and Wake Forest Medical School through donations to each school. Support also included free registration to the annual meeting and participation of the fellows in the educational program.
5. Supported efforts to obtain guaranteed total funding for fellowship positions at Duke, UNC, and Wake through engagement with interested corporate memberships.
6. Supported Rheumatology Research Foundation through donation to promote the mission to advance knowledge in Rheumatology and find treatments to improve the lives of patients with rheumatic diseases.
7. Endorsed the 12<sup>th</sup> Annual Basic and Clinical Immunology for the Busy Clinician CME Symposium and share the information with our members.
8. Endorsed the Biologic Therapies Summit XI and Vasculitis 2025: Advances and Controversies, May 8-10, 2025

### Advocacy:

1. Advocacy committee hosted a meeting on April 16 to set goals for the next year.
2. Active involvement in issues surrounding rheumatology practice to ensure patient access to care.
3. Advocacy on the state and federal level.
4. Board members remain active on ACR committees, Rheumatology Research Foundation and CSRO boards.
5. Communication with the ACR insurance subcommittee, government affairs committee, Affiliate State Council and CORC regarding advocacy issues.
6. Governing Member of the Alliance for Transparent and Affordable Prescriptions (ATAP).
7. Ongoing advocacy through ACR. State legislative and Capitol Hill visits by several members, including board members.
8. Participated NCMS Advocacy Day in June 2024.
9. Participation in NC Medical Society initiatives.
10. Support CSRO through membership and attendance of CSRO annual conference and other meetings.
11. One of our board members, Dr. Firas Kassab, is on the CSRO board and the RRF board.
12. Four members attended CSRO's Advocacy Conference in September 2024.
13. Sign ATAP's letter PBM Accountability Sign-On Letter - Hold UnitedHealth Group Accountable.

14. Signed NC Medical Society letter to BCBSNC in response to their E/M policy announcement. BCBSNC rescinded their recently announced E/M policy.
15. Sign on CSRO letters to letters supporting restriction of copay accumulator adjusters.
16. Sign on CSRO letter regarding CY 2025 Payment Policies under the Medicare Physician Fee Schedule and Other Changes to Part B Payment and Coverage Policies.
17. Sign on CSRO letter regarding the Safe Step Act (S.652/H.R.2630)
18. Held meeting with BCBSNC via Zoom to discuss underwater biosimilars and mandated specialty pharmacy policies in the spring.
19. Followed up with BCBSNC regarding the underwater biosimilar that led to BCBSNC offering an adjustment in the reimbursement rate of 2 biosimilars to some members.
20. Worked with CSRO on asking Palmetto to retire the article pertaining to the downcoding of administration code for infusion and injections services based on CMS directives.
21. Working with CSRO on laying the ground for legislation in NC that would ban alternative funding programs.
22. Sign on CSRO - MPFS - Medicare Patient Access and Practice Stabilization Act of 2024 letter.

### **Communication to Members:**

1. Communication to membership through newsletters and blast emails with relevant updates
2. Encourage members to renew or become AMA members so that ACR can retain voting status.
3. Encourage NCRA members to participate in advocacy directly by commenting on proposed rules and providing them with templates to do so as well as joining the advocacy committee and participating in state advocacy in Raleigh
4. Enhance social media (FB, Twitter (X), Instagram).
5. Updated website.

### **Citizenship:**

1. Promoting the mission of NCRA regionally and its importance as a platform for NC rheumatologists to meet, connect, share knowledge and advocate for patients with rheumatic conditions.



## Policies for Contributors

**Purpose:** To establish a consistent policy for all contributors (corporate members, sponsors, exhibitors).  
The policies will be attached to all letters requesting funding for NCRA education sessions.

### Membership Policies:

1. The NCRA funding levels are described in this corporate membership prospectus.
2. All promised funds must be received within one month of agreement being signed.

### Conference Policies:

3. Contributors must follow instructions to upload documents into the Attendee Hub (mobile app) by due date or NCRA will not guarantee data will be visible to attendees.
4. Contributors *will not* plan any event that conflicts in any way with NCRA sponsored events, NCRA sanctioned events, or NCRA co-sponsored events at the NCRA 2025 meeting. Choosing to plan an event that conflicts with an NCRA sponsored, sanctioned, or co-sponsored event will result in the organization not being invited to join us at our next event.

*An event is any activity from dinner with one conference attendee to an event to which many attendees are invited.*

5. Contributors may not wear their corporate name tags in the meeting space.
6. Contributors may **NOT** attend the annual NCRA business meeting.
7. Contributor representatives may attend general sessions if space available. The representatives **must sit in back of room** and may not engage the speaker or attendees.
8. Contributors are provided a specific number of name badges as described in the attached document. **Name badges may not be traded among representatives.**

### Exhibit Hall Policies for 2025 Annual Conference

1. Each contributor will respect the exhibit set-up hours established by NCRA. Exhibit set-up and shipping information will be shared with all contributors by February 1, 2025.
2. The contributor will follow instructions regarding shipping items to the hotel. If instructions are not followed NCRA is not responsible for missing exhibit items.
3. Exhibit space will be provided as indicated in the prospectus.
  - a. Corporate members and sponsors may request a smaller space or to split their space. Request must be received by February 1, 2025.
4. Exhibits must be installed within the parameters of your exhibit space with no components extending beyond. Your installation may not block other exhibitors.
  - a. If your organization will not need the tables provided, your space will be noted on the floor.
  - b. You must notify NCRA that you will not be using your tables no later than February 1, 2025.

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5. No banners, signs or other material may be nailed, taped, hung to any hotel property. If a contributor defaces The Washington Duke Inn, they are responsible for the damage.
6. While the exhibit hall will be monitored during the day and locked after our sessions end, exhibitors and sponsors are encouraged to insure their exhibits, merchandise, and display materials against theft, fire, etc at their own expense. NCRA is not responsible for any damage to or theft of the exhibits.

### **Indemnification**

1. Contributors agree to abide by these terms, and any applicable provisions under NCRA's agreement with the management of The Washington Duke Inn.
2. Contributors assume full responsibility and liability for any loss, damage or claim arising out of injury or damage to sponsor and exhibitor's displays/materials.
3. Contributors agree to defend, indemnify, and hold harmless The Washington Duke Inn from and against all claims, actions, causes of actions, or liabilities, including reasonable attorney's fees arising out of or resulting from any act undertaken or committed by Contributor or any contractors hired or engaged by the Contributor in connection with the conference.
4. Contributors also agree to defend, indemnify, and hold harmless The Washington Duke Inn from any liability resulting from any claim, action or action, which may be asserted by third parties arising out of the performance of the Contributor's obligations pursuant to this agreement, except those which are due to misconduct or negligence of the hotel.

## 2025 Agenda

Friday, March 14	
4:00pm – 7:00pm	Registration Exhibit Hall Set-Up
Saturday, March 15 6.5 Hours	
7:00am – 7:45am	<b>Breakfast in Exhibit Hall</b>
7:45am – 8:00am	<b>Welcome</b> A. Silvia Ross, MD
8:00am – 8:45am	<b>Practical Dermatology for Rheumatologists</b> (.75 credit hour) Robert G Micheletti, MD
8:45am – 9:30am	<b>Transition of Care Concerns in JIA: How They Never Lose Their 'J'</b> (.75 credit hour) Rebecca Sadun, MD, PhD
9:30am – 10:00am	<b>CSRO and NCRA 2025 Federal and State Advocacy Update</b> (.5 credit hour) Firas Kassab, MD FACR
10:00am – 10:30am	Break
10:30am – 11:15am	<b>Cognitive Bias</b> (.75 credit hour) Liana, Fraenkel, MD, MPH
11:15am – 12:00	<b>Interactive Knowledge Session</b> (.75 credit hour) Additional information available below
12:00pm – 1:00pm	Lunch
1:00pm – 1:45pm	<b>The Eyes Have It: Ocular Manifestations in Rheumatic Disease</b> (.75 credit hour) George R. Mount, MD, MHPE
1:45pm – 2:30pm	<b>Psoriatic Arthritis: Are you managing your patient effectively?</b> (.75 credit hour) Elaine Husni, MD
2:30pm – 3:00pm	Break
3:00pm – 3:30pm	<b>Business Meeting</b>
3:30pm – 4:15pm	<b>Update in Vasculitis</b> (.75 credit hour) Philip Seo, MD, MHS
4:15pm – 5:00pm	<b>Interactive Knowledge Session</b> (.75 credit hour) Additional information below
5:00pm – 6:00pm	Reception & Posters

<b>Sunday, March 16 (4 hrs)</b>	
7:00am – 7:45am	<b>Breakfast in Exhibit Hall</b>
7:45am – 8:00am	<b>Welcome</b> A. Silvia Ross, MD
8:00am – 8:45am	<b>Year in Review</b> (.75 credit hour) Philip Seo, MD, MHS
8:45am – 9:30am	<b>Comprehensive Management of Obesity and Effects on Rheumatic Diseases</b> (.75 credit hour) William Yancy, MD MHS FTOS
9:30am – 10:30am	Fellows Case Presentations (1 credit hour)
10:30am – 11:00am	Break
11:00am – 11:45am	<b>Cardiovascular Disease in Patients with Rheumatologist Diseases</b> (.75 credit hour) Rekha Mankad, MD
11:45am – 12:30pm	<b>Axial Spondyloarthritis Therapy: Biomarkers, Biologics, and Beyond</b> (.75 credit hour) Elaine Husni, MD

### Interactive Knowledge Sessions

<b>Topic</b>	<b>Speakers</b>
<b>11:15am – 12:00pm</b>	
Cutaneous Manifestations of Rheumatic Disease	Robert Micheletti, MD Matilda Nicholas, MD
Growing Pains: Working with Challenging Young Adult Patients	Rebecca Sadun, MD Katherine Kauffman, MD
Nutrition, Obesity, Exercise, and Health Wellness In Rheumatic Disease	William Yancy, MD Brian Andonian, MD
<b>4:15pm – 5:00pm</b>	
Uveitis Ocular Rheumatic Disease	George Mount, MD Rex McCallum, MD
Psoriatic Arthritis and Axial Spondyloarthropathies	Elaine Husni, MD Rad Moeller, MD
Vasculitis	Philip Seo, MD Nicole Orzechowski, MD

# **NCRA 2025**

## **CORPORATE MEMBERSHIP LEVELS**

### **Corporate Membership Benefits at the Silver level (\$7,500) include:**

- Two (2) tables at our annual meeting
- Four (4) attendee name badges
  - Opportunity to bring two (2) additional representatives at the reduced rate of \$200/person purchased during when registering representatives
  - Name badges provide entrance into exhibit hall, and
  - Name badges provide entrance into general sessions if space available\*
  - Entrance into the Saturday and Sunday breakfast and breaks, Saturday lunch, and Saturday reception
  - Name badges are not transferable between representatives
- Four (4) conference notebooks provided at the conference
  - Corporate logo in conference notebook on corporate membership page
- Four (4) complimentary access codes for the conference mobile app
- Corporate profile on conference mobile app which will allow your assigned representative to add your logo, corporate description, contact information, brochures/documents and links to your social media accounts to your profile.
- Podium recognition at conference and annual meeting
- Company name on NCRA website with link to your website
  - You provide link you would like NCRA to use

\* priority is given to non-corporate conference attendees for general session seating



## **Corporate Membership Benefits at Gold level (\$10,000) include:**

- Two (2) tables at our annual meeting
- Six (6) attendees name badges
  - Opportunity to bring two (2) additional representatives at the reduced rate of \$200/person purchased during when registering representatives
  - Name badges provide entrance into exhibit hall, and
  - Name badges provide entrance into general sessions if space available\*
  - Entrance into the Saturday and Sunday breakfast and breaks, Saturday lunch, and Saturday reception
  - Name badges are not transferable between representatives
- Six (6) conference notebooks provided at the conference
  - Corporate logo in conference notebook on corporate membership page
- Six (6) complimentary access codes for the conference mobile app
- Corporate profile on conference mobile app which will allow your assigned representative to add your logo, corporate description, contact information, brochures/documents and links to your social media accounts to your profile.
- Podium recognition at conference and annual meeting
- Company name on NCRA website with link to your website
  - You provide link you would like NCRA to use
- Fifteen (15) minute private meeting with NCRA executive board on the friday before the annual meeting

\* priority is given to non-corporate conference attendees for general session seating

## **Corporate Membership Benefits at Ruby level (\$15,000) include:**

- Two (2) tables at our annual meeting in a prime location
- Seven (7) attendees name badges
  - Opportunity to bring two (2) additional representatives at the reduced rate of \$200/person purchased during when registering representatives
  - Name badges provide entrance into exhibit hall, and
  - Name badges provide entrance into general sessions if space available\*
  - Entrance into the Saturday and Sunday breakfast and breaks, Saturday lunch, and Saturday reception
  - Name badges are not transferable between representatives
- Seven (7) conference notebooks provided at the conference
  - Corporate logo in conference notebook on corporate membership page
- Seven (7) complimentary access codes for the conference mobile app
- Corporate profile on conference mobile app which will allow your assigned representative to add your logo, corporate description, contact information, brochures/documents and links to your social media accounts to your profile.
- Podium recognition at conference and annual meeting and any other event hosted by NCRA during 2025 year,
- Company name and logo on NCRA website with link to your website
  - You provide link you would like NCRA to use
- Ability to provide one (1) poster that was accepted at 2024 acr meeting for a \$5,000 fee. Poster will be displayed during the Saturday reception.
- Thirty (30) minute private meeting with NCRA executive board on the friday before the annual meeting,
- One (1) conversation with NCRA president about issues
- One (1) announcement through NCRA's social media platforms

\* priority is given to non-corporate conference attendees for general session seating

## **Corporate Membership Benefits at Platinum level (\$20,000) include:**

- Opportunity to apply for a sanctioned event
- Three (3) tables at our annual meeting in a prime location
- Eight (8) attendees name badges
  - Opportunity to bring two (2) additional representatives at the reduced rate of \$200/person purchased during when registering representatives
  - Name badges provide entrance into exhibit hall, and
  - Name badges provide entrance into general sessions if space available\*
  - Entrance into the Saturday and Sunday breakfast and breaks, Saturday lunch, and Saturday reception
  - Name badges are not transferable between representatives
- Eight (8) conference notebooks provided at the conference
  - Corporate logo in conference notebook on corporate membership page
- Eight (8) complimentary access codes for the conference mobile app
- Corporate profile on conference mobile app which will allow your assigned representative to add your logo, corporate description, contact information, brochures/documents and links to your social media accounts to your profile.
- Podium recognition at conference and annual meeting and any other event hosted by NCRA during 2025 year
- Company name and logo on NCRA website with link to your website
  - You provide link you would like NCRA to use
- Sponsorship of the Saturday reception
- One (1) poster that was accepted at 2024 acr meeting. Poster will be displayed during the Saturday reception. You may purchase a 2<sup>nd</sup> poster for \$5000.
- Thirty (30) minute private meeting with NCRA executive board on the friday before the annual meeting
- Two (2) conversations with NCRA president about issues
- Two (2) announcements through NCRA's social media platforms

\* priority is given to non-corporate conference attendees for general session seating

## **Corporate Membership Benefits at Diamond level (\$30,000) include:**

- Opportunity to apply for a sanctioned event
- Three (3) tables at our annual meeting in a prime location
- Ten (10) attendees name badges
  - Opportunity to bring two (2) additional representatives at the reduced rate of \$200/person purchased during when registering representatives
  - Name badges provide entrance into exhibit hall, and
  - Name badges provide entrance into general sessions if space available\*
  - Entrance into the Saturday and Sunday breakfast and breaks, Saturday lunch, and Saturday reception
  - Name badges are not transferable between representatives
- Ten (10) conference notebooks provided at the conference
  - Corporate logo in conference notebook on corporate membership page
- Ten (10) complimentary access codes for the conference mobile app
- Corporate profile on conference mobile app which will allow your assigned representative to add your logo, corporate description, contact information, brochures/documents and links to your social media accounts to your profile. NCRA will provide location in exhibit hall.
- Podium recognition at conference and annual meeting and any other event hosted by NCRA during 2025 year,
- Company name and logo on NCRA website with link to your website
  - You provide link you would like NCRA to use
- Allows NCRA to support fellows participating in NCRA annual meeting
- Sponsorship of the Saturday lunch with vendors
- One (1) poster that was accepted at 2024 acr. Poster will be displayed during the Saturday reception. You may purchase a 2<sup>nd</sup> poster for \$5000.
- Forty-five (45) minute private meeting with NCRA executive board on the friday before the annual meeting
- Four (4) conversations with NCRA president about issues
- Three (3) announcements through NCRA's social media platforms

\* priority is given to non-corporate conference attendees for general session seating

Updated October 2024



## **NCRA 2025 Sanctioned Events Application**

To hold any of the sanctioned events listed below, your company must participate at the Diamond (\$30,000) Corporate Membership Level or the Platinum (\$20,000) Corporate Membership Level.

Your application does **not** guarantee acceptance. Sanctioned event opportunities will be filled on a first-come-first-served basis for confirmed corporate members at the Diamond level and then the Platinum Level. Your corporate membership must have a written commitment before your application will be considered. Decisions will be based on the date of written funding confirmation for 2025.

Two decisions will be made in the first week of February 2025:

1. We will decide who will be allowed to host.
2. We will decide the date allotted to the sponsor for the event.

The sanctioned event host is responsible for finding a venue and covering all event costs (e.g., food, AV, speaker, speaker travel).

No application will be accepted before January 1, 2025.

When we share the day for your event, we will include the due dates for your promotional materials. We will do our best to advertise your program, but it is the responsibility of your representatives to spread the word about your event. We cannot include your event on our conference brochure or other formal written conference advertising. We will post on the conference website. We will share registration list (name, practice, street address) with you in February and then March.

**Company Name:**

**Main Contact for the Sanctioned Event**

**Name**  
**Email**  
**Phone**

**Sanction Event Opportunities** (Rank from 1-6 with 1 being your first choice)

\_\_\_\_ Friday Night after registration closes (beginning no earlier than 7pm)

\_\_\_\_ Friday Night after registration closes (beginning no earlier than 7pm)

\_\_\_\_ Saturday Night after the NCRA Reception (beginning no earlier than 6:30pm)

\_\_\_\_ Saturday Night after the NCRA Reception (beginning no earlier than 6:30pm)

\_\_\_\_ Saturday Night after the NCRA Reception (beginning no earlier than 6:30pm)

\_\_\_\_ Saturday Night after the NCRA Reception (beginning no earlier than 6:30pm)

\_\_\_\_\_  
Name

\_\_\_\_\_  
Date

Email this form to Tammy Bulger (bulgert@uncw.edu)



## Request for Taxpayer Identification Number and Certification

Go to [www.irs.gov/FormW9](http://www.irs.gov/FormW9) for instructions and the latest information.

**Give form to the requester. Do not send to the IRS.**

**Before you begin.** For guidance related to the purpose of Form W-9, see *Purpose of Form*, below.

<b>Print or type.</b> See <i>Specific Instructions</i> on page 3.	<p><b>1</b> Name of entity/individual. An entry is required. (For a sole proprietor or disregarded entity, enter the owner's name on line 1, and enter the business/disregarded entity's name on line 2.)</p> <p><b>North Carolina Rheumatology Association</b></p>	
	<p><b>2</b> Business name/disregarded entity name, if different from above.</p>	
	<p><b>3a</b> Check the appropriate box for federal tax classification of the entity/individual whose name is entered on line 1. Check only one of the following seven boxes.</p> <p><input type="checkbox"/> Individual/sole proprietor    <input type="checkbox"/> C corporation    <input type="checkbox"/> S corporation    <input type="checkbox"/> Partnership    <input type="checkbox"/> Trust/estate</p> <p><input type="checkbox"/> LLC. Enter the tax classification (C = C corporation, S = S corporation, P = Partnership) . . . . .</p> <p><b>Note:</b> Check the "LLC" box above and, in the entry space, enter the appropriate code (C, S, or P) for the tax classification of the LLC, unless it is a disregarded entity. A disregarded entity should instead check the appropriate box for the tax classification of its owner.</p> <p><input checked="" type="checkbox"/> Other (see instructions) <span style="margin-left: 100px;"><b>501c3</b></span></p>	<p><b>4</b> Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):</p> <p>Exempt payee code (if any) _____</p> <p>Exemption from Foreign Account Tax Compliance Act (FATCA) reporting code (if any) _____</p> <p style="text-align: right;"><i>(Applies to accounts maintained outside the United States.)</i></p>
	<p><b>3b</b> If on line 3a you checked "Partnership" or "Trust/estate," or checked "LLC" and entered "P" as its tax classification, and you are providing this form to a partnership, trust, or estate in which you have an ownership interest, check this box if you have any foreign partners, owners, or beneficiaries. See instructions . . . . . <input type="checkbox"/></p>	
	<p><b>5</b> Address (number, street, and apt. or suite no.). See instructions.</p> <p><b>341 S. College Rd., Ste 11, PMB 2046</b></p>	<p>Requester's name and address (optional)</p>
	<p><b>6</b> City, state, and ZIP code</p> <p><b>Wilmington, NC 28403</b></p>	
	<p><b>7</b> List account number(s) here (optional)</p>	

**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.

<b>Social security number</b>										
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5	6	-	1	5	6	6	5	3	0	

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

**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.

<b>Sign Here</b>	Signature of U.S. person <u>Tamnda A Belger</u>	Date <u>4/30/24</u>
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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](http://www.irs.gov/FormW9).

**What's New**

Line 3a has been modified to clarify how a disregarded entity completes this line. An LLC that is a disregarded entity should check the appropriate box for the tax classification of its owner. Otherwise, it should check the "LLC" box and enter its appropriate tax classification.

New line 3b has been added to this form. A flow-through entity is required to complete this line to indicate that it has direct or indirect foreign partners, owners, or beneficiaries when it provides the Form W-9 to another flow-through entity in which it has an ownership interest. This change is intended to provide a flow-through entity with information regarding the status of its indirect foreign partners, owners, or beneficiaries, so that it can satisfy any applicable reporting requirements. For example, a partnership that has any indirect foreign partners may be required to complete Schedules K-2 and K-3. See the Partnership Instructions for Schedules K-2 and K-3 (Form 1065).

**Purpose of Form**

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS is giving you this form because they