

Print

Tourism Traditional Application - Submission #136

Date Submitted: 3/30/2018

I have read the Grant Guidelines posted on March 1, 2018

yes/no*

I plan to apply for two projects

yes/no

If yes please rank this project for level of priority

priority

Project Title*

Grant Cycle*

Amount Requested*

Total Project Cost*

Entity Federal Tax ID Number

Do not enter if putting in SSN

Entity Name*

Grant Contact Name*

Email Address*

Address*

4638 Lombard Ave

City*

Klamath Falls

State*

OR

Zip Code*

97603

Phone Number*

541-331-6219

Fax Number

Is there a separate person responsible for the grant application than the project? Please specify names of person(s) responsible for application and project.

Name(s)

Doug Brown, Mark Dodson

reply email

klamathfreedom@gmail.com

reply email

Are you or is anyone in your organization an employee of Klamath County Government or a relative of an employee of Klamath County Government?

yes/no

no

If yes, please enter name

Name

Are you or is anyone in your organization affiliated with or a relative of the Klamath County Tourism Review Committee?

yes/no

yes

If yes, please enter name

Name

Matt Dodson

Select which of Travel Oregon's Key Initiatives your project aligns with:

choose one*

Maximize economic re

Project (250 words or less)*

The Basin Brew and Q will be held July 13 - 14, 2018 at Steen Sports Park as the pinnacle event of the 2018 Klamath Freedom Days. Multi-day family event consisting of beer tasting, Pacific Northwest Barbecue sanctioned BBQ competition, adult softball tournament, and numerous musical acts. Local live music will also be played on a stage donated by the national guard throughout the day with the night ending with a family friendly local band. Event visitors will be able to sample beer, wine, and BBQ and vote on their favorites throughout the afternoon. This event is the culminating event for the Klamath Freedom Days, our 10 day community event that starts on the 4th of July with the independence day celebrations downtown and at the Fairgrounds. From July 5th through the 14th we will be hosting multiple community events at the sports park including a baseball tournament, soccer tournament, and a car show. We will also be showcasing local musicians throughout the week will live music in the evenings on the Air Guard stage.

Describe the project for which funding is requested (details should include the primary goals and objectives of your project). If your grant project is approved, this description will be used to highlight your grant, so be as specific as possible when describing the elements of your grant project

Need (250 words or less)*

We are increasing our advertising umbrella this year to include more of Northern California and Central Oregon, monies will be used to increase frequency and digital media varieties. Our community has amazing facilities that are capable of handling regional festivals, and concerts it is our intention to showcase as many of these locations as possible throughout the Klamath Freedom Days. We are also going to be placing advertising on industry specific publications for both the brewer competition as well as the BBQ competition, these will directly equate to out of town visitors for our local economy. By partnering with other media partners we have been able to dramatically stretch our marketing dollars in markets throughout Southern Oregon and Northern California. We are also investing in more canopies, tables and chairs this year to make it a true all weather event in the case of thunderstorms. The canopies also server a dual purpose for creating shade during the heat of the day, as well as sitting areas to enjoy the live music played throughout the day.

Describe the need for your project

Long-Term (250 words or less)*

Each year we have been building on the success of the prior years event to increase the size and opportunities of the Basin Brew and Q. By getting the BBQ portion of the event sanctioned as a two day event we will be having teams arriving on Friday afternoon and preparing meat to be judged Saturday afternoon. With the amount of space available with our partnership with Steen Sports Park we are envisioning on a separate field being used for the BBQ competition, while the rest of the event remains on the championship field under the lights. Each year we have continued to grow the interest of brewers committed to the event, with a expected attendance of 30 - 35 different brewers this year. These early commitments speak to the desire of distributors and craft brewers to have their beer on our list year after year. Craft Brewing is a large economic driver in our state and we are helping to grow the reputation of the Klamath Basin in that marketplace with events like the Basin Brew and Q.

What is the long-term plan for your project

Measurability (250 words or less)*

The Basin Brew and Q is a ticketed event so we will always have the specifics of the number of people attending, as well as the geographical area that they came from. By using on-line presale opportunities our customers are required to provide a zip code that again helps to refine where exactly our customer base is coming from. We are also going to be working with local hotels for the tournaments that weekend to house traveling teams that are attending the events at the Sports Park, these nights books can also be used to measure the success of the event. Long term success is being measured by the number of return visitors as well as the number of return vendors that we are having each year. The Basin Brew and Q is now on yearly calendars for both brew festivals and BBQ competitions. Ultimately we want to have conversations with the sanctioning bodies to establish the maximum number of competitors to increase the prize monies and reach of the event.

How will you measure the success of your project, in the short-term and in the long-term? Be as specific as possible.

You are not required to answer project preference questions, however answers may help to enhance a grant application's competitiveness.

Community/Region (250 words or less)

The Basin Brew and Q is a unique event unlike anything else that is offered in Klamath County, a true family friendly event that has activities for everyone in the community. All of the days events are showcasing not only Steen Sports Park but all of Klamath County and its diverse ability to host large regional events. The majority of the baseball and softball teams participating in the tournaments this weekend will be from out of town, traveling in for a weekend of entertainment. We will be increasing local traffic at hotels, restaurants, and grocery stores with out of town visitors who will want to come back to the next event that Klamath County host. We are also working with Discover Klamath and the Realtors of Klamath County to provide booth space to 'sell' our communities assets during all of our events.

Describe how this project complements and is consistent with your community and/or region's current local objectives

Support & Involvement (250 words or less)

Klamath Freedom Foundation has partnered with Steen Sports park as the facility for all of these events. We are also excited to be working with the Klamath Cornhole League this year to host a tournament during the Basin Brew and Q. This year we are also working with Pacific Crest Federal Credit Union, Columbia Distributing, Bullet Rentals, Home Depot, Kingsley Field, Air National Guard, Cook's Glass, Toyota, and finally new this year we are working with the Association of Realtors of Klamath County to co market a 'Tour of Homes' the same weekend as the Basin Brew and Q.

Describe how this project has the support and involvement of the community. (List any partners, sponsors, volunteers and their contributions and/or activities. Support letter from these partners will also enhance your application.)

Impact (250 words or less)

The Basin Brew and Q is a large specialized event that caters to many different people in our region and throughout the state. Oregon is the leading producer of micro-brews, and this event highlights these regional brewers in a manner that allows the consumer to compare them side by side. By using Steen Sports Park is creates a unique opportunity to showcase the many assets of our facility in new and exciting ways. By including a sanctioned BBQ event we will also dramatically increase the draw for regional teams this year.

In what ways does this project address a need in the tourism industry and show potential to generate significant regional and/or local impact?

Diversity/Inclusion (250 words or less)

The Klamath Freedom Days and Basin Brew and Q are simply a multiple day celebration of our community and everything that we have to offer. There are activities for all ages, and for every member of your family. Between the independence day parade down Main Street on the morning of the 4th, the afternoon and evening celebration at the Klamath County Fairgrounds capped of with the local firework display we are working very hard to develop a multiple day event celebrating our nations independence and everything connected with it. Including the many opportunities and activities going on at Steen Sports Park in the proceeding week just made sense, as it increases the visitor draw to our community, and showcases everything that we as a community can do.

In what ways does this project strive to promote diversity and inclusion (accessibility, minority populations or underserved visitor segments)?

Showcase partnership (250 words or less)

Klamath Freedom Foundation works with Columbia Distributing, Klamath Brewing, Mia and Pia's specifically for the Basin Brew and Q to give these private businesses a opportunity to showcase what they do in a different format. We also engage and work with numerous local musicians to again bring awareness and new audiences to them through our outdoor concerts. Without these partnerships the Klamath Freedom Days and Basin Brew and Q would not continue to grow and bring more visitors to our community each summer.

Describe how this project showcases a public/private partnership with Oregon-based small business.

Is this project/event in shoulder season?

yes/no*

no

Does the project/event occur outside urban growth boundaries?

yes/no*

no

Required supporting documents*

Realtors support letter.pdf

***Proof of federal tax id (if one is issued, do not upload docs for SSN)

***Entity's W-9 form (omit SSN) ***Grant Budget - Use the grant budget template provided ***Support letters - All entities are required to obtain support from 3 businesses/organizations ***If your grant project involves signage of any kind, you are required to gather and submit letters from all required local, regional or state sign authorities involved demonstrating approval to place signage on their land/property during the timeframe of the grant ***Marketing type projects - If producing collateral you must describe your distribution plan, including budgeted costs ***If your grant project involves infrastructure development/construction you must include plan drawings and approval from permitting authorities if required locally

Submission Instructions

After submission of this application, please print 8 copies, and attach all your supporting documentation (8 copies) and turn in to Klamath County Finance office, 305 Main St., Room 230, Klamath Falls, OR 97601. If mailing, must be postmarked by 2:00 PM March 31, 2018.

Insurance Requirements

Insurance Acord 25-S with County required minimums, Klamath County as additional insured, additional insured endorsement, proof of workers comp and auto coverage (if needed). If no employees or autos will be used for grant fulfillment, a document on letterhead stating no employees or autos will be used for grant fulfilment must be submitted.

Electronic Signature Agreement*

By checking the "I agree" box below, you agree and acknowledge that 1) your application will not be signed in the sense of a traditional paper document, 2) by signing in this alternate manner, you authorize your electronic signature to be valid and binding upon you to the same force and effect as a handwritten signature, and 3) you may still be required to provide a traditional signature at a later date.

I agree.

Electronic Signature

Mark M. Dodson

Date/Time*

3/21/2018

11:30 AM



5900 South 6th Street, Suite B Klamath Falls, OR 97603 (541) 885-5555 Fax (541) 884-1532

March 27, 2018

Klamath County Tourism Grants Committee
C/o Klamath County Finance Office
305 Main Street
Klamath Falls, Oregon 97601

RE: Letter of Support – Klamath Freedom Foundation

Bullet Rentals recognizes the years of hard work of Doug Brown and the Klamath Freedom Foundation. We support this exceptional organization and their pursuit of a Klamath County Tourism grant. Mr. Brown, through countless exceptional events, definitely makes Klamath County a better place. He continues to assist veterans, first responders and several worthy organizations through his initiatives. Every year Doug finds new opportunities to knit agencies and people together in Klamath and the entire region; he is a true asset to our County. The 2018 Freedom Days Festival will serve numerous local and regional organizations. We have supported Klamath Freedom Foundation with in kind donations for several years for good reasons. We truly believe this Foundation is deserving of our support.

Our Community is fortunate to have Doug Brown and the efforts of the many volunteers from Klamath Freedom Foundation. We look forward to supporting Freedom Days this year; Doug's leadership will ensure it is the highlight of the summer.

Bullet Rental & Sales, Inc.

Klamath County Event Center

March 22, 2018

To Whom It May Concern:

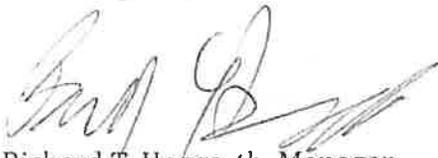
This letter is offered in support of the Klamath Freedom Celebration which is held, in part, at the Klamath County Fairgrounds.

Doug Brown, Founder and Chair Person, of the Klamath Freedom Celebration brings a noteworthy performance to the Klamath Falls community every year celebrating our service men and women, as well as cancer survivors and victims of all ages. This Free Event has risen to a level that is one of the Klamath County Fairgrounds-Event Center's premier events.

Doug continues to maintain a level of professionalism in all aspects of this event, striving for event excellence and marketability to the entire community, as well as the surrounding areas of Oregon and California.

Doug and his volunteers are to be commended for their excellence and work bringing the Klamath Falls Community an outstanding celebration.

Warm regards,



Richard T. Hoggarth, Manager
Klamath County Fairgrounds-Event Center



Klamath County

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Klamath County
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Heather Tramp
Executive Director
Chrystal Vaughan
Programs & Marketing Coordinator
Joyce Jordan
Office Coordinator

205 Riverside Drive Ste A
Klamath Falls, OR 97601
Phone: (541) 884-5193
Fax: (541) 884-5195
www.klamath.org

March 23, 2018

Klamath County Finance
Tourism Traditional Grant Program
305 Main St.
Klamath Falls, OR 97601

RE: Letter of support for Klamath Freedom Celebration-Klamath Freedom Days

To Whom It May Concern:

Please accept this letter on behalf of The Klamath County Chamber of Commerce in support of Klamath Freedom Celebration's grant application to the Klamath County Tourism Grant Program.

The Klamath Freedom Days celebration will be a 10 day event with the 4th of July activities at the beginning, and the Basin Brew & Q at the close. The 4th of July celebration will be located at the Fairgrounds; on July 5th, the festivities will be moving to Steen Sports Park. The entertainment for the subsequent days of the event include live music, activities such as baseball and soccer, family games, children's entertainment, and the encore event, the Basin Brew & Q. This ten day celebration will encourage participation from outside the community, providing an economic boost, while engaging and marketing the services of numerous local businesses.

We support a grant award to promote Klamath Freedom Days as this event benefits the entire community.

Sincerely,

Heather Tramp
Executive Director, Klamath County Chamber of Commerce
541-884-5193

"The Klamath County Chamber of Commerce is committed to Klamath County by advancing its economic vitality and quality of life through the education, promotion and networking of our members"

March 22, 2018
Klamath County Tourism Grants Committee
c/o Klamath County Finance Office
305 Main Street
Klamath Falls, Oregon 97601
RE: Letter of Support – Klamath Freedom Days

Dear Committee Members,

The Herald and News offers its support of Doug Brown and the Klamath Freedom Foundation in their pursuit of a **Klamath County Tourism Grant** for the 2018 Freedom Days Festival this July 4-14 2018. Last year we partnered with them to produce a special publication to help drive attendance at their Freedom Days festivities. This special section was well received both locally in print and by out-of-town traffic to our website.

Doug is the most passionate promoter I have worked with, and he truly recognizes the importance of driving local and out of town attendance to the events he organizes. His dedication to our community, veterans, and charitable causes is both admirable and tangible in the results he produces.

With the additions to the festival this year, I believe we as a community have an opportunity to attract visitors from all over Southern Oregon and Northern California to celebrate with us. Like last year, the Herald and News looks forward to partnering with him to make this event successful. We believe that events like this help to exemplify the patriotism and community spirit that make Klamath County a great place to live and visit.

Benjamin Kenfield

Benjamin Kenfield
Director of Revenue
The Herald and News

DISCOVER
KLAMATH

OREGON UNEXPECTED

March 21, 2018

Klamath County Tourism Grants Committee
c/o Klamath County Finance Office
305 Main Street
Klamath Falls, Oregon 97601

RE: Letter of Support – Klamath Freedom Days

Dear Committee Members,

Discover Klamath Visitor and Convention Bureau, official tourism agency for Klamath County, supports the efforts of Doug Brown and his organization (Klamath Freedom) which seeks a **Klamath County Tourism Grant**, which (if granted) would help facilitate development and implementation of the 2018 Freedom Days Festival this July 4-14 2018.

I've had the pleasure of working with Doug on no fewer than two dozen events over the past 9+/- years. I can say without hesitation Doug is by far the most experienced and results-oriented Event Developer/Promoter in our area. There's a lot to like about Doug, but, what excites me is that he's (a) Always trying new things, (b) Recognizes the critical nature of effective partnerships (e.g. lodging, food and beverage, equipment suppliers, volunteers, etc...) to the success of his events, and, (c) Recognizes the importance of attracting both locals and out of town visitors. Doug strives to grow his events into regional destination type events (as opposed to just locals).

This year, the KLAMATH FREEDOM FESTIVAL has been extended by several days, and will include activities geared towards families and youth. Two activities: (a) Archery Tag and (b) KnockerBall are exciting sporting activities and have proven themselves as attractions (and money makers) in other areas. New this year will be a car show which we know and have seen will draw out of town visitors.

In addition, the key event of the Festival – The Basin Brew & Q – is once again poised to bring in between 20-30 beer brands from around the region, and will include live music, food, additional activities and family-friendly fun. This year, Doug has taken the extra step to sanction the event which will draw even more and bigger beer brands as well as more visitors from outside the area.

If awarded a tourism grant, our organization looks forward to supporting efforts of the proponent group to encourage additional tourism this July.

Jim Chadderdon

Jim Chadderdon
Executive Director

Pacific Crest

FEDERAL CREDIT UNION

March 23, 2018

Klamath County Tourism Grants Committee
c/o Klamath County Finance Office
305 Main Street
Klamath Falls, Oregon 97601

RE: Letter of Endorsement – Klamath Freedom Days

Dear Committee Members,

Pacific Crest Federal Credit Union is in support of the efforts of the Klamath Freedom Celebration. Doug Brown is a passionate individual working hard for what he believes in and supporting the great community we live in. His organization is seeking a Klamath County Tourism Grant to help facilitate development and implementation of the 2018 Freedom Days Festival July 4th – 14th 2018.

The credit union has been the series sponsor for the last two years of the Klamath Freedom Celebration. It has been a pleasure to work with Doug. Doug works hard and relentlessly earns the needed support for the events which are well planned and well promoted throughout the basin. Doug is creative and plans new things to include all demographics of the community and to keep things new and exciting. He promotes the events with many organizations in the community, earning a partnership to further promote the event and the local businesses. He has many volunteers lined up to support the events, which help them to run smoothly. He promotes the events in logical medias to attract visitors from out of town, thereby increasing tourism in Klamath County.

The Klamath Freedom Celebration grows and strengthens each year. The Celebration has been extended by several days to include activities geared towards families and youth. Some of the new activities are Archery Tag and Knocker Ball. These activities are exciting and promote the local health of our community and are proven attractions in other areas. There will also be a new car show this year, which is always well received in our community. The Basin Brew & Q is planned to bring in between 20-30 beer brands from around the region, and will include live music, food, and other family friendly activities.

We urge you to support the Klamath Freedom Celebration by awarding the organization a tourism grant.

Sincerely,

Sharon Hartley,

Executive Assistant & Marketing Liaison

FIND YOUR PATH

800.570.0265

PO Box 1179, Klamath Falls, OR 97601

myPCFCU.org



Klamath County Association of REALTORS®

3815 S. 6th St. Ste. 152
Klamath Falls, OR 97603
(541) 882-2528 ♦ Fax (541) 883-7125

The Voice For Real Estate® In Klamath County

24 March 2018

The Klamath County Association of Realtors® (KCAR) proudly supports Klamath Freedom Celebration Series in their Basin Brew & Q and other efforts this year.

In collaboration with Klamath Freedom Celebration, local Realtors® will be holding a great number of Open Houses for a large "Tour of Homes Weekend" on Saturday, July 14 and Sunday, July 15, 2018. Every year, one of the focuses of the Klamath Freedom Celebration Series Basin Brew & Q is aimed at increasing the number of attendees from out of town and helping to showcase the many wonderful activities and businesses there are to visit while in Klamath County.

For the Tour of Homes weekend we will be gathering items and gift certificates to add to a gift basket that we will give away to one lucky winner who will be picked at random. Each person who attends an Open House on the Tour of Homes weekend and brings a canned food item (which will be donated to the Klamath Food Bank) will be entered to win the basket. Local Realtors® will be volunteering at the Basin Brew & Q while promoting local attractions hopefully at a booth during the event. We will be investing in advertising around the Pacific Northwest to promote our event alongside the Klamath Freedom Celebration Series.

Together, KCAR looks forward to joining with Klamath Freedom Celebration, Discover Klamath and other organizations to increase the levels of tourism in our area. We can't think of a more perfect organization to lead the efforts than Doug Brown and his Series.

The Klamath County Association of REALTORS® is an organization of real estate professionals serving Klamath County. We adhere to the highest standards in ethics, advised by the National Association of REALTORS®. Our mission is to serve our members and the community by developing and supporting services to enhance professionalism and competency in our industry.

While we are still working through final details and ways we can support the event, we look forward to a strong collaboration between KCAR and Klamath Freedom Celebration to explode this event, similar to Bend Brewfest and other similar events around the Pacific Northwest.

Margot Durand

Director of Community Outreach
Klamath County Association of Realtors®
EIN 93-0646402
541-274-1903
margotdurand@gmail.com

COMPLETE "BUDGET" COLUMNS (C & D) ONLY FOR APPLICATION. LEAVE "ACTUAL" CO

Klamath Freedom Foundation Basin Brew and Q					
INCOME					
		BUDGET		Actual	
		Cash	Volunteer	Cash	In-Kind
<i>Klamath County Matching Grant</i>		\$25,000.00			
OTHER INCOME					
Glass Sponsor		\$5,000.00			
Beer Sponsor / Donation		\$2,500.00			
Vendor Space Rental @50.00 a space		\$500.00			
Ticket Sales @\$12.00		\$15,000.00			
BBQ Entrants @ \$100.00		\$800.00			
Event T-Shirt Sales		\$500.00			
Softball Tournament		\$2,500.00			
Event Sponsors		\$4,900.00			
	SUB TOTAL INCOME	\$56,700.00	\$0.00	\$0.00	\$0.00
	TOTAL INCOME	\$56,700.00			\$0.00
EXPENSES					
LINE ITEM		BUDGET		Actual	
		Cash	In-Kind	Cash	In-Kind
1	Generator Rental		\$3,000.00		
2	Light Rental		\$3,500.00		
3	Staff Time Event Fliers (\$25 / hr 100 hours)		\$2,500.00		
4	Digital Media (Rogue Valley/Redding)	\$7,500.00			
5	Print Media (Rogue Valley/Redding)	\$5,000.00			

LUMNS (F & G) BLANK FOR GRANT APPLICATION (ON

6	Radio Media (Rogue Valley/Redding)	\$2,500.00					
6	Television (Rogue Valley/Redding)	\$10,000.00					
7	Event Set-up (\$25 / hr 120 hours)		\$3,000.00				
8	Glass Purchase	\$1,800.00					
9	Security	\$1,500.00					
10	Ticket Printing	\$500.00					
11	BBQ Contest Sanctioning	\$100.00					
12	BBQ Prize money	\$4,500.00					
13	Canopies and chairs	\$3,000.00					
14	Music Entertainment	\$2,500.00					
15	Facility Rental		\$4,000.00				
16	Event Insurance	\$1,800.00					
17							
	SUB TOTAL EXPENSES	\$40,700.00	\$16,000.00			\$0.00	\$0.00
	TOTAL EXPENSES		\$56,700.00				\$0.00

Request for Taxpayer Identification Number and Certification

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

Print or type
 See Specific Instructions on page 2.

Name (as shown on your income tax return) Klamath Freedom Foundation	
Business name/disregarded entity name, if different from above	
Check appropriate box for federal tax classification: <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 <input type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=partnership) ▶ _____ <input checked="" type="checkbox"/> Other (see instructions) ▶ NonProfit	Exemptions (see instructions): Exempt payee code (if any) _____ Exemption from FATCA reporting code (if any) _____
Address (number, street, and apt. or suite no.) 4638 Lombard Drive	Requester's name and address (optional)
City, state, and ZIP code Klamath Falls Oregon 97603	
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 the "Name" line to avoid backup withholding. For individuals, this is your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the Part I instructions on page 3. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN* on page 3.

Note. If the account is in more than one name, see the chart on page 4 for guidelines on whose number to enter.

Social security number									
-				-					
Employer identification number									
4	7	-	2	4	9	0	0	9	0

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 on page 3.

Sign Here	Signature of U.S. person ▶	Date ▶ 6/1/17
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General Instructions

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

Future developments. The IRS has created a page on IRS.gov for information about Form W-9, at www.irs.gov/w9. Information about any future developments affecting Form W-9 (such as legislation enacted after we release it) will be posted on that page.

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, payments made to you in settlement of payment card and third party network transactions, 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:

- Certify that the TIN you are giving is correct (or you are waiting for a number to be issued),
- Certify that you are not subject to backup withholding, or
- 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, and

4. Certify that FATCA code(s) entered on this form (if any) indicating that you are exempt from the FATCA reporting, is correct.

Note. If you are a U.S. person and 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
- 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 under section 1446 on any foreign partners' share of effectively connected taxable income from such business. Further, in certain cases where a Form W-9 has not been received, the rules under section 1446 require a partnership to presume that a partner is a foreign person, and pay the section 1446 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 section 1446 withholding on your share of partnership income.