

## ATRS Request for Taxpayer Identification Number (TIN) and Certification

Name (Last, First, Initial) \_\_\_\_\_

SSN \_\_\_\_\_ Birthdate \_\_\_\_/\_\_\_\_/\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Telephone Number (\_\_\_\_) \_\_\_\_\_ Alternate Number (\_\_\_\_) \_\_\_\_\_

Email Address (optional) \_\_\_\_\_

The TIN provided must match the given name above. For individuals, this is your social security number (SSN). For other entities, it is the Taxpayer Identification Number that has been assigned to the Estate, Trust or Business Entity. Please check the appropriate box and enter your TIN.

Individual

Social Security Number									

Trust, Estate, Business

Employee Identification Number									

**Certification**

Under penalties of perjury, I certify that:

- 1 The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me), and
- 2 I am a U.S. Citizen or other U.S. person (defined below).

**Certification instructions**

You must provide your correct TIN. See instructions on the next page.

**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).

Signature \_\_\_\_\_ Date \_\_\_\_\_

## What Name and Number To Give the Requestor

### For this Type of Account:

### Give the name and SSN of:

1. Individual	The individual
2. Two or more individuals (joint account)	The actual owner of the account or, if combined funds, the first individual on the account <sup>1</sup>
3. Custodian account of a minor (Uniform Gift to Minors Act)	The minor <sup>2</sup>
4. a. The usual revocable savings trust (grantor is also trustee)	The grantor-trustee <sup>1</sup>
b. So-called trust account that is not a legal or valid trust under state law	The actual owner <sup>1</sup>
5. Sole proprietorship or disregarded entity owned by an individual	The owner <sup>3</sup>
6. Grantor trust filing under Optional Form 1099 Filing Method 1 (see Regulation section 1.671-4(b)(2)(i)(A))	The grantor*

### For this Type of Account:

### Give the name and EIN of:

7. Disregarded entity not owned by an individual	The owner
8. A valid trust, estate, or pension trust	Legal entity <sup>4</sup>
9. Corporation or LLC electing corporate status on Form 8832 or Form 2553	The corporation
10. Association, club, religious, charitable, educational, or other tax-exempt organization	The organization
11. Partnership or multi-member LLC	The partnership
12. A broker or registered nominee	The broker or nominee
13. Account with the Department of Agriculture in the name of a public entity (such as a state or local government, school district, or prison) that receives agricultural program payments	The public entity
14. Grantor trust filing under the Form 1041 Filing Method or the Optional Form 1099 Filing Method 2 (see Regulation section 1.671-4(b)(2)(i)(B))	The trust

<sup>1</sup>List first and circle the name of the person whose number you furnish. If only one person on a joint account has an SSN, that person's number must be furnished.

<sup>2</sup>Circle the minor's name and furnish the minor's SSN.

<sup>3</sup>You must show your individual name and you may also enter your business or "DBA" name on the "Business name/disregarded entity" name line. You may use either your SSN or EIN (if you have one), but the IRS encourages you to use your SSN.

<sup>4</sup>List first and circle the name of the trust, estate, or pension trust. (Do not furnish the TIN of the personal representative or trustee unless the legal entity itself is not designated in the account title.) Also see Special rules for partnerships on page 1.

\***Note.** Grantor also must provide a Form W-9 to trustee of trust.