



Promotional and Community Event Grant Application

Company Name McKinney Downtown Business Re-Development, Inc.

Federal Tax I.D. 04-3615798

Incorporation Date 01-10-2002

Mailing Address 111 N. Tennessee St., McKinney, TX, 75069

Phone Number (972) 547-2660

Email contact-mainstreet@mckinneytexas.org

Website downtownmckinney.com

Social Media <https://www.facebook.com/downtownmckinney/>,
<https://www.instagram.com/downtownmckinney>

Please provide a detailed narrative about your organization including years established, mission, goals, scope of services, staff, successes, contribution to community, etc.

McKinney Main Street celebrates our authentic downtown as a destination for everyone. We connect our rich history and bright future through unique cultural experiences. Home to 180 small businesses, we encourage economic vitality through diverse partnerships and buy-local support.

Our core values were created to guide us in the pursuit of honoring Historic Downtown McKinney through every endeavor. As custodians of the Cultural District, it is our responsibility to preserve of historical assets by protecting the traditional aesthetic of Downtown and simultaneously implementing safeguards to treasured historical properties.

In addition to that responsibility, we work diligently to cultivate a safe family-friendly environment and foundation to support community gatherings.

It is our goal to present a Downtown destination that enhances the 'Uniquely McKinney' experience by embracing cultural diversity, and advocate opportunities that enhance revenue for businesses and the City of McKinney.

The McKinney Main Street takes an intentional approach to creating and presenting events and festivals that influence economic development and provide advocacy support to Downtown small businesses.

The success and growth of Downtown McKinney projects and programs are attributed to the Main Street's pillar of advancement, which include design, organization, promotion, and economic vitality.

Main Street staff also works alongside local and state agencies to achieve and maintain objectives. These partnerships are important as they strengthen relationships with Downtown and East McKinney property owners, merchants, and residents.

Select One Nonprofit 501(c)3 (Attach copy of IRS Determination Letter)

IRS Determination Letter for 501(c)3 [IRS Determination Letter.pdf](#)

Representative Completing Application Jakia Brunell

Mailing Address 111 North Tennessee Street, McKinney, TX, 75069

Phone Number (972) 547-9023

Email jbrunell@mckinneytexas.org

Contact for Communications Between MCDC and Organization Andrew Jones

Address 111 North Tennessee Street, McKinney, TX, 75069

Phone Number (972) 547-2661

Email ajones2@mckinneytexas.org

Funding - Total Amount Requested \$14,000

Are matching funds available? Yes

Matching Funds Available 14000

Will funding be requested from any other City of McKinney entity (e.g. Visit McKinney, Arts Commission, City of McKinney Community Support Grant)?

No

Provide name of City of McKinney entity funding source and amount.

n/a

Have you received or will funding be requested from other organizations / foundations?

No

Provide name of organization / foundation funding source and amount.

n/a

Has a request for funding for this Promotional / Community Event been submitted to MCDC in the past five years?

Yes

Please list. 2024, 2023, 2022, 2021, 2020

Board of Directors Onel Perez, Preston Schwalls, Von Daniel, Amy Pyeatt, Kate McAnally, Mike Buchanan, Lauren Smith, Kim Black, Ginger Hayes, Heather Lowry (alternate), Daniel Stampfel (alternate)

Leadership Staff Andrew Jones, Martin (Graham) Meyers, Gregory Hearn, Ryan Phelan, Heidi Wiese, Jakia Brunell

Date(s) of Event Friday, September 26th to Sunday, September 28th

Location(s) Downtown McKinney

Event(s) open to the public? Yes

Ticket Prices	Free to admission
Describe the target audience for the event(s).	McKinney residence and community members within a 30-mile radius. Our festival is a family-friendly event, so all ages are welcome.
Is this the first for this event?	No
If not, what is the history for the event (annual / biannual since what year)?	McKinney Oktoberfest is Historic Downtown McKinney's largest signature event. Now in its 18th year, the three-day festival attracts over 80,000 visitors to enjoy Bavarian traditions including beer, brats and polka. As one of the largest Oktoberfest celebrations in North Texas, the festival attracts visitors from across DFW and beyond.
How does event showcase McKinney for tourism and/or business development?	<p>This event highlights Historic Downtown McKinney Cultural District as a destination for arts, culture and shopping. By inviting guests to attend one of the largest Bavarian cultural celebrations in North Texas, this allows our staff to not only promote the cultural district but introduce guests to all our 180 small businesses.</p> <p>The success of McKinney Oktoberfest helps raise revenues for the McKinney Main Street program to assist with preservation-based economic development.</p>
Expected attendance.	80,000
Expected number or percentage of attendees coming from outside of McKinney.	30%
Does the event support a non-profit (other than applicant)?	No
If yes, what organization(s) are supported?	n/a
What percentage of revenue will be donated (indicate gross or net)?	n/a
Gross Revenue	702,427.10

Projected Expenses 495,644.31

Net Revenue 209,789.79

Other Funding Sources
Tomes Auto Group - \$35,000
Sports Clips - \$4,000
Blue Box - \$15,000
LJA Engineering - \$8,000
Texans Credit Union - \$5,000
Renewal by Andersen of North Texas - \$2000
William Ryan Homes - \$7,000
LeafFilter - \$3,000
Choctaw - \$15,000

all payments are due by the end of June 2025

Provide a detailed narrative of the event(s) including mission, goals, activities, schedule, production timeline, goals for growth / expansion, etc.

McKinney Oktoberfest is a three-day festival celebrating German beer, food, and culture. Beginning on Friday, September 26th we'll host our 1st keg-tapping following an annual parade throughout the festival grounds. Three stages will feature polka music and traditional dancing from community cultural groups.

On Saturday, September 27th, we'll host another keg-tapping with Tupps Brewery and feature one of the biggest highlights of the event, the popular stein holding competition. Guests can sign up to demonstrate their feats of strength and compete for a chance to win an opportunity travel for the regional stein-holding competition sponsored by Hofbrau. On the same stage and night, we host the highly competitive "police vs. fire" root beer holding competition. It's a crowd favorite and the spectators grow every year.

Provide a detailed marketing plan and budget for the event(s).

Support from MCDC will allow Main Street to advertise and promote McKinney Oktoberfest to attract regional and new visitors to McKinney. 100% of MCDC support will be invested in promotions and advertising to bring guests from areas surrounding McKinney.

Plans for a robust marketing campaign (outside of McKinney area) include:

Promoted and paid Social Media posts
Local and regional Content Creator partnerships
Digital billboards
Frisco, Plano, Dallas magazines and publications

Standard marketing initiatives:

- 200 posters in downtown and throughout community
- Postcards
- Press releases

- The Dallas Morning News: Guide Live, Community Impact News, Local Profile Magazine and daily newsletters
- Email blasts
- Downtown marquees and kiosks
- Website presence, downtownmckinney.com, mckinneyperformingartscenter.org, mckinneytexas.org, visitmckinney.com

Plan should include promotional channels (print ads including publication names, social media, radio, posters, flyers, yard signs, etc.)

Promotional Channel	Budget
Traditional Media - Newspapers	6600
Social Media - Facebook, Instagram	12,000
Billboards	1500
Signage	9500
Event t-shirts	4,300
Facebook/Instagram Ad	1500

Event Marketing Plan and Budget Attachment

[Oktoberfest 2025 Marketing Budget.pdf](#)

Total Promotional Budget 46500

What percentage of the total marketing budget does the grant represent? 31%

Attendance from previous event(s), if applicable 80,000 total attendance

Marketing lessons learned from past (what worked and what did not). Our staff has recognized that social media is a key component to communicating this event in an effective and affordable manner. We've increased our budget to partnering with local and regional content creators to share the message about the event. We've also learned that using newspaper publication, Community Impact, is far more impactful than using Dallas Morning News: Guide Live to promote Oktoberfest. Waiting until late August to begin the promotional campaign is not helpful. There are far too many options promoting at the same time and our message can easily become lost or added to the noise. An earlier promotional plan has proved to be successful and helped us usher in the largest attendance to date.

How will you measure success of your event and marketing campaign? (attendance, website hits, social media indicators, etc.)

We'll measure the success of this event in the following ways:
Attendance
Number of kegs emptied
Food vendor sales records
Downtown businesses foot traffic and sales numbers (information gleaned from survey.)
Social media engagement - shares, comments, likes, and views
Tickets sold to event activities like, stein-holding, brat eating, carnival rides

Please include examples of past marketing efforts (screen shots of ads, posters, social posts, radio text, etc.)

please see attached email to ljones2@mckinneytexas.org

Budget

[TransactionReport \(1\).pdf](#)

What percentage of Project / Promotional / Community Event funding will be provided by the applicant?

100%

Are matching funds available?

Yes

Sponsorship Revenue

94,000

Registration Fees

0

Donations

0

Other (raffle, auction, etc.)

0

Net Revenue

209,782.79


Metrics to Evaluate Success: Outline the metrics that will be used to evaluate success of the proposed Promotional / Community Event. If funding is awarded, a final report will be required summarizing success in





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Attendance
Number of kegs emptied
Food vendor sales records
Downtown businesses foot traffic and sales numbers (information gleaned from survey.)
Social media engagement - shares, comments, likes, and views
Tickets sold to event activities like, stein-holding, brat eating, carnival rides

achieving objectives
outlined for the event.

Budget	Oktoberfest 2025 Marketing Budget 4863.pdf
Financial Statements	TransactionReport (1) 6521.pdf
IRS Determination Letter (if applicable)	135_IRS Determination Letter 1405.pdf
W9	Form W-9 (Rev. March 2024) City of McKinney 2024.pdf

We certify that all figures,
facts, and representations
made in this application,
including attachments, are
true and correct to the
best of our knowledge.

Hidden to protect your privacy

Chief Executive Officer	 Hidden to protect your privacy
Date	 Hidden to protect your privacy
Representative Completing Application	 Hidden to protect your privacy
Date	 Hidden to protect your privacy

MCKINNEKY OKTOBERFEST MARKETING BUDGET 2025

Billboards	1500
Event T-Shirts	4300
Newspaper	6600
Signage	9500
Social Media	12000
Facebook/Instagram Ad	1500
TOTAL	36,900

Transaction Report								
McKinney Main Street								
September 1, 2024-May 28, 2025								
TRANSACTION DATE	TRANSACTION TYPE	NUM	NAME	LINE DESCRIPTION	FULL NAME	ITEM SPLIT ACCOUNT	AMOUNT	BALANCE
Event Expenses								
Marketing Expense								
09/05/2024	Check	8114	JL Event Pro LLC	Sponsorship Commission for OKT sponsorship recruitment Inv #253 & 281	Event Expenses:Marketing Expense	First United Bank Checking	7,600.00	7,600.00
09/11/2024	Expense		Local Profile	LOCAL PROFILE 972-769-7277 TX	Event Expenses:Marketing Expense	First United Bank Checking	750.00	8,350.00
09/30/2024	Expense		Lovelyn Photography LLC	WP*Lovelyn Photography Allen TX	Event Expenses:Marketing Expense	NEW Main Street Card	2,955.00	11,305.00
09/30/2024	Journal Entry	327		Accrue Okt expenses paid in 10.2024	Event Expenses:Marketing Expense		2,000.00	13,305.00
10/01/2024	Journal Entry	327R		REVERSE Accrue Okt expenses paid in 10.2024	Event Expenses:Marketing Expense		-2,000.00	11,305.00
10/03/2024	Check	8178	JL Event Pro LLC	Sponsorship Commission for OKT sponsorship recruitment Inv #290	Event Expenses:Marketing Expense	First United Bank Checking	2,000.00	13,305.00
Total for Marketing Expense							\$13,305.00	
Social Media								
09/05/2024	Check	8113	Seerel Meadows	okt Influencer	Event Expenses:Marketing Expense:Social Media	First United Bank Checking	500.00	500.00
09/09/2024	Expense		FACEBOOK	FACEBK *26MH78LT72 650-5434800 CA	Event Expenses:Marketing Expense:Social Media	NEW Main Street Card	900.00	1,400.00
09/17/2024	Check	8118	Rubys Foodies	OKT Influencer Inv#227	Event Expenses:Marketing Expense:Social Media	First United Bank Checking	300.00	1,700.00
09/17/2024	Check	8119	Carrie Rosenbalm	Social Media Post for OKT	Event Expenses:Marketing Expense:Social Media	First United Bank Checking	300.00	2,000.00
09/22/2024	Expense		FACEBOOK	FACEBK *KDPQKACU72 305-2154008 CA	Event Expenses:Marketing Expense:Social Media	NEW Main Street Card	900.00	2,900.00
09/26/2024	Expense		The Social Scribe	THE SOCIAL SCRIBE WWW.THESOCIALTX	Event Expenses:Marketing Expense:Social Media	NEW Main Street Card	2,375.00	5,275.00
09/29/2024	Expense		Gleam.IO	GLEAM.IO HIGH CAMP AU	Event Expenses:Marketing Expense:Social Media	NEW Main Street Card	49.00	5,324.00
09/30/2024	Expense		FACEBOOK	FACEBK *JBPGAAYT72 305-2154008 CA	Event Expenses:Marketing Expense:Social Media	NEW Main Street Card	386.10	5,710.10
09/30/2024	Journal Entry	327		Accrue Okt expenses paid in 10.2024	Event Expenses:Marketing Expense:Social Media		4,000.00	9,710.10
10/01/2024	Journal Entry	327R		REVERSE Accrue Okt expenses paid in 10.2024	Event Expenses:Marketing Expense:Social Media		-4,000.00	5,710.10
10/03/2024	Check	8170	Hannah Fairchild	Social Media Marketing OKT- 093024, 092424	Event Expenses:Marketing Expense:Social Media	First United Bank Checking	1,750.00	7,460.10
10/03/2024	Check	8171	Ngoc Nguyen	OKT mktg	Event Expenses:Marketing Expense:Social Media	First United Bank Checking	1,450.00	8,910.10
10/03/2024	Check	8172	The Peppy Wings	OKT Marketing - Inv 92424	Event Expenses:Marketing Expense:Social Media	First United Bank Checking	500.00	9,410.10
10/03/2024	Check	8190	Melissa Saylor	OKT Social Media Influencer	Event Expenses:Marketing Expense:Social Media	First United Bank Checking	300.00	9,710.10
11/06/2024	Check	8216	Cristina Massey	Socail Media Influencer OKT	Event Expenses:Marketing Expense:Social Media	First United Bank Checking	300.00	10,010.10
Total for Social Media							\$10,010.10	
Misc Marketing								
09/13/2024	Expense		EB Ads Campaign	EB ADS CAMPAIGN HTTPSWWW.EVENCA	Event Expenses:Marketing Expense:Misc Marketing	NEW Main Street Card	203.42	203.42
09/22/2024	Expense		EB Ads Campaign	EB ADS CAMPAIGN HTTPSWWW.EVENCA	Event Expenses:Marketing Expense:Misc Marketing	NEW Main Street Card	504.38	707.80
09/30/2024	Journal Entry	327		Accrue Okt expenses paid in 10.2024	Event Expenses:Marketing Expense:Misc Marketing		439.28	1,147.08
10/01/2024	Expense		EB Ads Campaign	EB ADS CAMPAIGN HTTPSWWW.EVENCA	Event Expenses:Marketing Expense:Misc Marketing	NEW Main Street Card	439.28	1,586.36
10/01/2024	Journal Entry	327R		REVERSE Accrue Okt expenses paid in 10.2024	Event Expenses:Marketing Expense:Misc Marketing		-439.28	1,147.08
Total for Misc Marketing							\$1,147.08	
Billboards								
09/16/2024	Expense		Primary Media	OKT Marketing	Event Expenses:Marketing Expense:Billboards	First United Bank Checking	1,500.00	1,500.00
Total for Billboards							\$1,500.00	
Event T-Shirts								
09/19/2024	Expense		Tumbleweed TexStyles LLC	OKT VIP Shirts	Event Expenses:Marketing Expense:Event T-Shirts	First United Bank Checking	1,986.75	1,986.75
09/19/2024	Expense		120 Inc.	INCENTIVE BRANDS 469-374-9000 TX	Event Expenses:Marketing Expense:Event T-Shirts	NEW Main Street Card	2,054.30	4,041.05
Total for Event T-Shirts							\$4,041.05	
Signage								
09/19/2024	Check	8123	Speedpro Imaging	OKT signage	Event Expenses:Marketing Expense:Signage	First United Bank Checking	8,144.86	8,144.86
09/23/2024	Check	8153	Speedpro Imaging	OKT signage	Event Expenses:Marketing Expense:Signage	First United Bank Checking	908.87	9,053.73
09/30/2024	Journal Entry	327		Accrue Okt expenses paid in 10.2024	Event Expenses:Marketing Expense:Signage		750.11	9,803.84
10/01/2024	Journal Entry	327R		REVERSE Accrue Okt expenses paid in 10.2024	Event Expenses:Marketing Expense:Signage		-750.11	9,053.73
10/03/2024	Check	8169	Speedpro Imaging	OKT signage- 19858, 20155, 20160, 20170 balance	Event Expenses:Marketing Expense:Signage	First United Bank Checking	750.11	9,803.84
Total for Signage							\$9,803.84	
Newspaper								
04/14/2025	Check	8464	Community Impact Newspaper	OKT 2025	Event Expenses:Marketing Expense:Newspaper	First United Bank Checking	6,570.00	6,570.00
Total for Newspaper							\$6,570.00	
Total for Marketing Expense with sub-accounts							\$46,377.07	
Total for Event Expenses with sub-accounts							\$46,377.07	
TOTAL							\$46,377.07	

ATLANTA GA 39901-0001

In reply refer to: 0752857837
Apr. 20, 2016 LTR 4168C 0
04-3615798 000000 00
00029561
BODC: TE

MCKINNEY DOWNTOWN BUSINESS
REDEVELOPMENT BOARD INC
% AMY BEAR
111 N TENNESSEE ST
MCKINNEY TX 75069-4319

020666

Employer ID Number: 04-3615798
Form 990 required: YES

Dear Taxpayer:

We issued you a determination letter in October 2002, recognizing you as tax-exempt under Internal Revenue Code (IRC) Section 501(c)(3).

Our records also indicate you're not a private foundation as defined under IRC Section 509(a) because you're described in IRC Sections 509(a)(1) and 170(b)(1)(A)(vi).

Donors can deduct contributions they make to you as provided in IRC Section 170. You're also qualified to receive tax deductible bequests, legacies, devises, transfers, or gifts under IRC Sections 2055, 2106, and 2522.

In the heading of this letter, we indicated whether you must file an annual information return. If a return is required, you must file Form 990, 990-EZ, 990-N, or 990-PF by the 15th day of the fifth month after the end of your annual accounting period. IRC Section 6033(j) provides that, if you don't file a required annual information return or notice for three consecutive years, your exempt status will be automatically revoked on the filing due date of the third required return or notice.

For tax forms, instructions, and publications, visit www.irs.gov or call 1-800-TAX-FORM (1-800-829-3676).

If you have questions, call 1-877-829-5500 between 8 a.m. and 5 p.m., local time, Monday through Friday (Alaska and Hawaii follow Pacific Time).

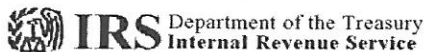
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Apr. 20, 2016 LTR 4168C 0
04-3615798 000000 00
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MCKINNEY DOWNTOWN BUSINESS
REDEVELOPMENT BOARD INC
% AMY BEAR
111 N TENNESSEE ST
MCKINNEY TX 75069-4319

Sincerely yours,

A handwritten signature in cursive script, appearing to read "Teri M. Johnson".

Teri M. Johnson
Operations Manager, AM Ops. 3



ATLANTA GA 39901-0001

020666.655390.319170.32384 1 AT 0.399 530



MCKINNEY DOWNTOWN BUSINESS
REDEVELOPMENT BOARD INC
% AMY BEAR
111 N TENNESSEE ST
MCKINNEY TX 75069-4319

CUT OUT AND RETURN THE VOUCHER IMMEDIATELY BELOW IF YOU ONLY HAVE AN INQUIRY.
DO NOT USE IF YOU ARE MAKING A PAYMENT.

CUT OUT AND RETURN THE VOUCHER AT THE BOTTOM OF THIS PAGE IF YOU ARE MAKING A PAYMENT,
EVEN IF YOU ALSO HAVE AN INQUIRY.

The IRS address must appear in the window.

0752857837

BODCD-TE

Use for inquiries only

Letter Number: LTR4168C
Letter Date : 2016-04-20
Tax Period : 000000

INTERNAL REVENUE SERVICE

ATLANTA GA 39901-0001



043615798

MCKINNEY DOWNTOWN BUSINESS
REDEVELOPMENT BOARD INC
% AMY BEAR
111 N TENNESSEE ST
MCKINNEY TX 75069-4319

043615798 AJ MCKI 00 2 000000 670 000000000000

The IRS address must appear in the window.

0752857837

BODCD-TE

Use for payments

Letter Number: LTR4168C
Letter Date : 2016-04-20
Tax Period : 000000

INTERNAL REVENUE SERVICE

KANSAS CITY MO 64999-0204



043615798

MCKINNEY DOWNTOWN BUSINESS
REDEVELOPMENT BOARD INC
% AMY BEAR
111 N TENNESSEE ST
MCKINNEY TX 75069-4319

043615798 AJ MCKI 00 2 000000 670 000000000000

**Request for Taxpayer
Identification Number and Certification**

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

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

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

Print or type. See Specific Instructions on page 3.	1 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.) CITY OF MCKINNEY	
	2 Business name/disregarded entity name, if different from above.	
	3a 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. <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"/> LLC. Enter the tax classification (C = C corporation, S = S corporation, P = Partnership) Note: 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. <input checked="" type="checkbox"/> Other (see instructions) MUNICIPALITY	4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3): Exempt payee code (if any) 3 Exemption from Foreign Account Tax Compliance Act (FATCA) reporting code (if any) <i>(Applies to accounts maintained outside the United States.)</i>
	3b 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"/>	
	5 Address (number, street, and apt. or suite no.). See instructions. PO BOX 517 6 City, state, and ZIP code MCKINNEY, TX 75070 7 List account number(s) here (optional)	Requester's name and address (optional)

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Social security number									
			-				-		
or									
Employer identification number									
7	5	-	6	0	0	0	5	9	9


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.

Sign Here	Signature of U.S. person 	Date 3/27/24
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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.

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