

Promotional and Community Event Grant Application

Organization Name Millennial Maven Creative Foundation

CEO / Executive Director Bridgette Jones

Federal Tax I.D. 99-0747051

Incorporation Date 10-05-2023

Mailing Address 13601 Preston Rd, E565, Dallas, TX, 75240

Phone Number (205) 447-0097

Email info@millennialmavencf.com

Website <https://www.millennialmavencf.com/>

Social Media <https://www.facebook.com/people/Millennial-Maven-Creative-Foundation/61573651850502/>, <https://www.instagram.com/millennialmavencf>

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

The Millennial Maven Creative Foundation was established in 2023 with the mission to empower underserved women and youth through access to creative careers and opportunities, fostering a vibrant and sustainable community that promotes personal growth and social change through the arts. Our goals include providing hands-on experiences, mentorship, and professional development to enhance career pathways, while also advocating for mental health awareness through creative expression. We have successfully hosted events such as Rooted in Rhythm in McKinney, attracting over 1,500 people to District 121 from April to October, and the Holiday Hoedown at Tupps Brewery, which collected over \$2,000 worth of food for Meals On Wheels of Collin County and 300 toys for Minnie's Pantry. Additionally, we have partnered with FIFA Dallas for the Creatives Academy, giving 50 youth the opportunity to participate, and we've organized sold-out art shows, fashion shows, and festivals throughout the DFW metroplex, resulting in valuable partnerships and contributions to workforce and economic development. Our dedicated staff, including Bridgette Jones, Valesse Jones, Antone Amalbert, Devin Wilmott-Johnson, Zack Turner, Gina Dorvilier, Teja Smith, Monique Battiste, and Azizah Shaheed, work tirelessly to ensure the holistic well-being of our participants and contribute to a more inclusive cultural landscape in our city. Through these initiatives, we curate cultural experiences and jumpstart careers that make a significant social and economic impact, elevating voices that may otherwise go unheard and creating a sense of belonging within our community.

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

IRS
Determination Letter for 501(c)3 [Millennial Maven Creative Foundation 501c3.pdf](#)

Is the representative information same as above? No

Representative Completing Application Valese Jones

Mailing Address 5769 W Arbor Hills Way, The Colony, TX, 75056

Phone Number (214) 885-1541

Email valesej@sincerelynicole.net

Is the contact for communications between MCDC and the organization same as above? Yes

Total Amount Requested 15000

Are matching funds available? Yes

Matching Funds Available 50000

Have you received or will funding be requested from any other City of McKinney entity (e.g. Visit McKinney, Arts Commission, Yes

City of McKinney
Community
Support Grant)?

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

If applicable,
please indicate
the name of the
events, year(s)
and amount(s) of
MCDC funding
received in the
past five years. Rooted In Rhythm 2025, \$6000

Date(s) of Event July 21, August 18, September 22 and October 3

Location(s) District 121

Ticket Prices July 21st, August 18th, September 22nd-\$20
October 3rd- Early Bird GA \$30 Early Bird Vip \$75 Early Bird Family of four GA \$100, Early Bird Family of Four VIP \$200
GA-\$45, VIP-\$90, Family GA-\$150, Family VIP-\$300

Is this the first
time for this
event? No

If not, what is the
history for the
event (beginning
in what year and
how often is it
held)? Rooted In Rhythm was conceived as a platform to showcase up and coming voices in the country music genre, initially scheduled to take place in April 2025. However, due to inclement weather, the event had to be postponed. To maintain community engagement during this period, we hosted line dance classes at District 121 from April to October, ensuring that excitement for the event continued to build. Additionally, we organized a listening party and a free concert to promote the festival and bring the community together.

Rooted In Rhythm officially took place in October 2025, successfully attracting a heterogenous audience and featuring a mix of local and national acts within the country music genre. The event highlighted how music and the arts are shared cultural experiences that foster community in ways nothing else can. Recognizing the positive impact of the festival, we are committed to making Rooted In Rhythm an annual event that continues to uplift voices and strengthen community connections in the years to come.

How does event showcase McKinney for tourism and/or business development? The Rooted In Rhythm festival showcases McKinney as a vibrant destination for tourism and business development in several impactful ways. By featuring a lineup of up and coming voices in the country music genre, the event attracts attendees from across the region and beyond, highlighting McKinney's commitment to inclusivity and cultural richness. This influx of visitors not only boosts local tourism but also promotes McKinney as a hub for creative expression and community engagement.

Our partnership with The Common Table has proven to be mutually beneficial, particularly through the hosting of line dance classes once a month on their traditionally slower Tuesdays. By introducing these engaging dance sessions, we created a fun and dynamic atmosphere for the community while significantly increasing foot traffic and revenue for the restaurant. On the official festival day, The Common Table experienced a remarkable 37% increase in sales, showcasing the direct impact of our collaboration.

Moreover, the festival provides a platform for local businesses to gain visibility, as attendees are encouraged to explore the area, dine at local restaurants, and shop at nearby stores. Partnerships with local vendors and sponsors further enhance the economic impact, fostering collaborations that contribute to the community's growth. By positioning McKinney as a host for significant cultural events like Rooted In Rhythm, the city enhances its reputation as a desirable location for future events, attracting more festivals, concerts, and activities that can benefit the local economy. Overall, the festival serves as a catalyst for tourism and business development, showcasing McKinney's unique charm and commitment to fostering a thriving community.

Does the event support a non-profit (other than applicant)? No

What percentage of revenue will be donated (indicate gross or net)? 20

Expected total attendance and how calculations were made. 2000 based on last year's numbers from line dance classes and festival

Expected percentage of attendees coming from outside of McKinney. 41

percentage

28

percentage

72

Geographic
Reach
(estimated travel
distance) 1191

The target audience for the Rooted In Rhythm festival includes families, young adults, seniors, and individuals of all ages. The event aims to attract a wide range of participants, reflecting the rich ethnic composition of the community. According to recent demographics, the audience includes:

- Race/Ethnicity:
 - White: 14.5%
 - Black: 37.2%
 - Latino: 25.6%
 - Asian: 3%
 - Native Hawaiian/Pacific Islander: 5.2%
 - Other: 14.5%

- Age Distribution:
 - Ages 18-24: 1.2%
 - Ages 25-34: 13.4%
 - Ages 35-44: 26.3%
 - Ages 45-54: 25.3%
 - Ages 55-64: 15.4%
 - Ages 65 and older: 16.6%

- Gender:
 - Women: 68.1%
 - Men: 31.9%

In terms of interests, the festival attracts a wide array of individuals, including families, music lovers, art enthusiasts, and community service advocates. Attendees are drawn from various backgrounds and interests, encompassing those who appreciate arts and culture, enjoy recreation and sports, and have a passion for food and entrepreneurship. Additionally, the festival appeals to fitness enthusiasts and those who enjoy dance, as well as fans of country music and R&B/hip hop genres. This broad spectrum of interests underscores the festival's commitment to creating an inclusive and engaging celebration that resonates with the entire community.

Gross Revenue 194200

Projected Expenses	73,375.00
Net Revenue	120,825.00
Sponsorship Revenue	77,500.00
Registration Fees	102,750
Donations	10,000
Other (raffle, auction, etc.)	11,750
Net Revenue	202,000

Metrics to evaluate success of event. Outline the metrics that will be used to evaluate success of the proposed event (attendance, reach from across targeted audiences, funds raised, tickets sold, etc). If funding is awarded, a final report will be required summarizing success in achieving objectives outlined for the event.

To evaluate the success of the Rooted In Rhythm festival, we will utilize the following metrics:

1. Attendance:
 - Track the total number of attendees throughout the festival, with specific counts for each day and event segment.
 - Compare attendance figures to previous events to assess growth and engagement.
2. Demographic Reach:
 - Analyze the demographics of attendees to ensure we are reaching our targeted audiences, including families, young adults, seniors, and individuals from various racial and ethnic backgrounds.
 - Collect data on age, gender, and race/ethnicity through registration forms or surveys to measure representation.
3. Community Engagement:
 - Measure the number of participants in workshops, line dance classes, and other interactive activities, assessing community involvement and interest levels.
 - Track social media engagement metrics, including likes, shares, comments, and hashtag usage related to the festival.
4. Funds Raised:
 - Calculate the total funds raised through sponsorships, donations, ticket sales, and merchandise, assessing financial success and community support.
5. Tickets Sold:
 - Monitor the number of tickets sold for the event, both in advance and at the door, to evaluate marketing effectiveness and pricing strategy.
6. Vendor and Sponsor Participation:
 - Track the number and engagement of local vendors and sponsors involved in the event, assessing the level of community investment and support.
7. Feedback and Satisfaction:
 - Conduct post-event surveys to gather feedback from attendees regarding their

experience, including aspects such as entertainment, organization, and overall enjoyment.

- Analyze qualitative feedback to identify strengths and areas for improvement.

8. Media Coverage:

- Assess the amount and quality of media coverage received, including articles, interviews, and social media mentions, to gauge the event's visibility and impact on public perception.

If funding is awarded, a final report will be compiled summarizing the success of the event in achieving the outlined objectives, using the metrics above to provide a comprehensive analysis of the festival's impact on the community and its overall effectiveness in promoting up-and-coming voices in the country music genre.

The Millennial Maven Creative Foundation is dedicated to empowering underserved women and youth through access to creative careers and opportunities. Our mission is to cultivate a vibrant community that fosters personal growth and social change through the arts, while also launching initiatives to support creatives impacted by breast cancer.

Goals:

This year, Rooted in Rhythm evolves into the Positively Pink Edition, representing growth not only in scale but in purpose. Our goals include:

- Supporting creatives affected by breast cancer through the launch of the "Create Your Destiny" grant.
- Enhancing community engagement by bringing people together through cultural experiences.
- Providing a platform for emerging voices in the arts while promoting creative workforce development.

Planning and Execution Timeline:

- January - March: Initial planning, securing partnerships, and confirming artists.
- April - June: Marketing and promotion will kick off on Juneteenth, focusing on community outreach and event promotion.
- July - October: Hosting line dance classes and a listening party to maintain momentum.
- October 3rd: Execution of the Positively Pink Edition event.

Planned Activities:

- Pre-Event Activities:

- Line dance classes from July to October to engage the community and build excitement.
- A listening party that highlights headliner Elsie and promotes the festival.
- A rodeo party bus to offer a unique experience leading up to the event.

- During Event Activities:

- Activations by our partners and sponsors, including a boot fashion show, a best-dressed competition, and a dance competition.
- A cocktail curation class hosted by Two Chics and a Bottle.

History of Past Events:

What started as a vision has grown into a series of experiences that have brought people together in meaningful ways. Last year's Rooted in Rhythm festival attracted over 1,500 attendees through line dance classes and the festival day itself, highlighting the importance of supporting up-and-coming voices in the country music genre. Additional successful events include Civilized Fest with over 2,000 attendees, the Bloom Fashion Show, which sold out at 300, the Epic Fit Fest with 650 attendees, and a summer camp that engaged 135 youth.

Safety/Security Plan:

- Comprehensive security measures will be implemented, including trained security personnel onsite to ensure the safety of all attendees.
- Emergency response plans will be established, including first aid stations and coordination with local law enforcement.

Parking/Traffic Management Plan:

- Designated parking areas will be established to accommodate attendees, with clear signage to direct traffic flow.
- Shuttle services may be arranged to transport attendees from remote parking locations to the event site if needed.

Weather Contingency Plan:

- In case of inclement weather, contingency plans will include provisions for tents or indoor spaces to ensure the event can proceed safely and comfortably.

Event Staffing Plan:

- A dedicated team of volunteers and staff will be recruited to assist with various aspects of the event, including setup, attendee engagement, and logistical support.
- Training sessions will be held prior to the event to ensure all staff are prepared to provide excellent service and maintain safety protocols.

The Positively Pink Edition is not just a theme; it is a commitment to standing alongside creatives whose lives have been impacted by breast cancer. A portion of the proceeds will directly support the launch of our first grant, "Create Your Destiny," in honor of Destiny Zeigler, who lost her battle to stage 4 breast cancer at 30 years old. We will select several creatives affected by breast cancer to receive unrestricted funding, helping them continue their work and move forward.

October 3rd is more than a date; it is a shared cultural moment that brings people together and creates a sense of collective participation. It is where culture, community, and purpose align.

Partnerships with organizations like Credit Union of Texas, Lane Boots, Red Bull, and Milagro are built on shared values, contributing to something larger than visibility, creating lasting impact. Behind every number is a story: an artist who found their first audience, a creative who gained the confidence to continue, and a community that showed up and stayed connected.

Rooted in Rhythm is not just a festival; it is the clearest expression of our mission

in action, bringing together music, culture, and community into one shared experience that reflects who we are and what we stand for.

Describe how your event will showcase McKinney for tourism and economic development for residents and visitors (shopping and dining in McKinney, hotel stays, participation in other McKinney activities, etc.)

The Rooted In Rhythm festival will serve as a significant showcase for McKinney, promoting tourism and economic development for both residents and visitors. By attracting attendees from across the region, the event will highlight the city's vibrant culture and history, enhancing McKinney's reputation as a premier destination.

Shopping and Dining: The festival will encourage attendees to explore local shops, boutiques, and restaurants, driving traffic to businesses in the area. By promoting partnerships with local vendors and eateries, we create a bustling atmosphere where festival-goers enjoy the unique offerings of McKinney, contributing to increased sales and visibility for these establishments.

Hotel Stays: We are committed to driving tourism through strategic lodging partnerships. Following our successful pilot of securing 15 rooms at the Tru by Hilton in McKinney, we are expanding our impact this year by partnering with The Denizen. These collaborations incentivize visitors to stay locally, boosting occupancy rates and generating significant revenue for the hospitality sector.

Participation in Other Activities: The festival acts as a gateway for visitors to engage with local attractions. By providing information about nearby parks, museums, and cultural experiences, we encourage attendees to explore McKinney beyond the festival grounds, enriching their visit and promoting repeat tourism. Overall, Rooted In Rhythm serves as a catalyst for economic growth, showcasing McKinney's unique charm while supporting local businesses and driving sustainable tourism.

Provide a detailed and itemized promotional plan and budget for the event(s). Plan should include promotional channels (print ads including publication names, social media, radio, posters, flyers, yard signs, etc.)

Promotional Channel	Budget
Social Media Advertising	12000
Print Ads	5000
Radio Promotion	4000
Posters & Signs	3500
Community Partnerships	3000
Promo Merchandise	2500
Interactive Experiences	2500

Event Marketing Plan and Budget Attachment

[Marketing and Promotional Plan for Rooted In Rhythm Positively Pink Edition \(1\).pdf](#)

Total Promotional Budget 32500

Does your marketing plan include components specifically designed to promote your event(s) within the ethnically diverse communities that call McKinney home? Please share details.

Yes, our marketing plan includes several components specifically designed to promote the Rooted In Rhythm: Positively Pink Edition event within the ethnically diverse communities of McKinney. Here are the key strategies we will implement: 1. Line Dance Classes: We will host line dance classes that cater to various cultural backgrounds, encouraging participation from individuals of all ages and ethnicities. These classes will not only serve as a fun pre-event activity but will also build community engagement and awareness about the festival. 2. Targeted Posters and Flyers: We will distribute posters and flyers in local businesses that serve diverse communities, such as ethnic grocery stores, community centers, and cultural organizations. This targeted approach ensures that information about the event reaches a wide audience and resonates with different cultural groups. 3. Community Partnerships: We will collaborate with local organizations and community groups that represent various ethnic backgrounds. These partnerships will help us reach more individuals and promote the festival through established networks, enhancing our outreach efforts within the community. 4. Influencer Engagement: Engaging local influencers who represent the diverse demographics of McKinney will be a key part of our strategy. These influencers can help amplify our message, share their personal connections to the event, and encourage their followers to participate, creating a sense of community ownership and excitement around the festival. By implementing these strategies, we aim to create an inclusive atmosphere that welcomes and celebrates the rich cultural diversity of McKinney while promoting the Rooted In Rhythm festival effectively within these communities.

What percentage of the total marketing budget does the grant represent? 46%

Marketing lessons learned from past events (if applicable).

The key marketing lessons we learned from our last event, Rooted In Rhythm, highlighted areas for growth and improvement that will guide our future initiatives. While our interactive activities, such as line dance classes and listening parties, successfully engaged attendees, we recognize the need to expand these offerings to cater to diverse demographics. We aim to refine our targeted communication strategies by developing specific campaigns for families, young adults, and various cultural communities, ensuring we resonate with each group effectively. Leveraging influencer partnerships proved beneficial, and we plan to expand our network to include those representing diverse communities to enhance our outreach. Strengthening our social media strategy with a structured content calendar will keep our audience engaged leading up to the event. Additionally, we will implement more structured post-event surveys to gather valuable feedback, allowing us to adapt our strategies for future events. Fostering deeper community partnerships will amplify our reach, and establishing clear metrics for success will guide our decision-making and demonstrate our growth to stakeholders. By applying these lessons, we are confident that the upcoming Rooted In Rhythm:

Positively Pink Edition will be an even more successful and impactful event, further solidifying our commitment to community engagement and support for creatives.

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

https://www.instagram.com/p/DPzrv5kkQmx/?utm_source=ig_web_copy_link&igsh=MzRIODBiNWFIZA==

<https://www.facebook.com/people/Millennial-Maven-Creative-Foundation/61573651850502/>

Additional details related to marketing efforts.

Additional details related to marketing efforts include that our headliner, Elsie, will be featured on America's Got Talent this summer and is also filming another reality show as she prepares for the festival. These appearances will draw more attention to the event. Additionally, she will be performing at the World Cup Fan Festival, further increasing visibility and excitement surrounding the festival.

Metrics to evaluate success of marketing/promotional plan: Outline the metrics that will be used to evaluate overall success of the executed promotional plan. If funding is awarded, this should be included in the final report. (success in reaching new audiences, social media data, website analytics, etc).

Metrics to Evaluate Success of Marketing/Promotional Plan

To evaluate the overall success of the marketing and promotional plan for the Rooted In Rhythm: Positively Pink Edition event, we will utilize the following key metrics:

1. Attendance Figures:

- Track the total number of attendees at the festival compared to previous events, aiming for our goal of 1,100 attendees. This metric will help assess the effectiveness of our outreach efforts.

2. Ticket Sales Data:

- Monitor ticket sales during the early bird and final sales phases to evaluate revenue generation and the effectiveness of promotional campaigns. This includes tracking the number of general admission, VIP, and group tickets sold.

3. Social Media Engagement:

- Analyze engagement metrics across our social media platforms, including likes, shares, comments, and hashtag usage related to the event. We will aim for a significant increase in engagement compared to previous events, with a target growth of 400%.

4. Website Analytics:

- Utilize tools like Google Analytics to track website traffic, including unique visitors, page views, and referral sources. This data will provide insights into how effectively our marketing efforts are driving traffic to the event website.

5. Email Marketing Metrics:

- Evaluate the performance of email campaigns by tracking open rates, click-through rates, and subscriber growth. Our goal is to build an email database of over 2,000 engaged subscribers.

6. Community Engagement Metrics:

- Measure participation in pre-event activities, such as line dance classes and listening parties, to gauge community involvement and excitement leading up to the festival.

7. User-Generated Content:

- Track the amount of user-generated content shared on social media using event-specific hashtags, which will help us assess audience engagement and the effectiveness of our campaigns encouraging attendees to share their experiences.

8. Media Coverage:

- Assess the quantity and quality of media coverage received, including articles, interviews, and online mentions, to evaluate the event's visibility and public perception.

9. Sponsor and Partner Engagement:

- Monitor the level of engagement from sponsors and partners, including participation in promotional activities and their feedback on the event's impact on their brands.

10. Post-Event Survey:

- Conduct a survey of attendees after the event to gather feedback on their experience, including aspects such as entertainment, organization, and overall enjoyment. This qualitative data will help identify strengths and areas for improvement for future events.

If funding is awarded, a final report will include these metrics to provide a comprehensive analysis of the promotional plan's effectiveness and its success in achieving the outlined objectives for the Rooted In Rhythm: Positively Pink Edition event.

Budget	MMCF Budget 2025-2027 - With Formulas.csv
Financial Statements	MMCF 2025 P&L UPDATED.pdf MMCF 2024 990N (2).pdf
IRS Determination Letter (if applicable)	Millennial Maven Creative Foundation 501c3 9287.pdf
W9	MMCF W9 2024.pdf
Procedure	CHECKED: Application completed and submitted prior to deadline (5:00 PM on deadline date) CHECKED: Application Submitted via online form
Organization and Financial Information	CHECKED: Completed all organizational information CHECKED: Provided documentation of organization status (IRS letter, W9) CHECKED: Two most recent years of financial statements (budget + profit & loss) (audited if available)
Event Description	CHECKED: Missions, goals, execution timeline, programming/activities, budget CHECKED: Event dates, times, and location(s) CHECKED: Cultural or community relevance CHECKED: Target audience (numbers, demographics, geographic reach, diversity, past data)

Community & Economic Impact CHECKED: Description of how the event promotes tourism and economic development
CHECKED: Economic impact projections
CHECKED: Benefits to McKinney residents and the community's quality of life

Marketing & Promotional Plan CHECKED: Itemized marketing plan and budget
CHECKED: List of marketing channels (print, digital, radio, social, etc.)
CHECKED: Promotional time
CHECKED: Social media engagement data and website analytics (if available)

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

Marketing and Promotional Plan for Rooted In Rhythm: Positively Pink Edition

Event Overview

Rooted In Rhythm: Positively Pink Edition is a music festival taking place on October 3rd, coinciding with Mean Girls Day. This event combines live entertainment with breast cancer awareness, showcasing up-and-coming artists in the country music genre while raising funds for our "Create Your Destiny" grant, which supports creatives impacted by breast cancer.

Planning and Execution Timeline

June 19th: Launch Marketing Campaign

- Begin social media promotions and advertising.
- Announce festival date and key themes.

June 19th - August 3rd: Early Bird Ticket Sales

- Open early bird ticket sales for general admission, VIP, and group packages.
- Promote special pricing through social media, email marketing, and community outreach.

July 1st: Artist Announcement

- Reveal headliner Elsie and supporting acts (Angel White, Andrea Vasquez, Adrian Garza, Southbound Twins, Jada Cato, Lori Rayne,).
- Share promotional graphics and artist bios on social media.

July 21st: Pre-Event Engagement

- Kick off line dance classes and listening parties to maintain community excitement.
- Start promoting the "Burn Book" positivity station and interactive experiences.

August 1st: Final Ticket Sales Push

- Increase advertising efforts across digital platforms, local radio stations, and print media.
- Highlight the end of early bird pricing to encourage ticket purchases.

September 1st: Promotional Push

- Launch user-generated content campaigns encouraging attendees to share their own "Mean Girls" themed moments.
- Begin a 30-day countdown on social media featuring daily posts about festival activities and artist highlights.

October 1st: Final Promotions

- Intensify promotional efforts with last-minute reminders about the event.
- Collaborate with local influencers to spread the word and encourage attendance.

October 3rd: Event Day

- Execute the festival, ensuring all marketing elements are in place and engaging attendees throughout the day.

Marketing Budget: \$32,500

1. Social Media Advertising: \$12,000

- Targeted ads on Facebook, Instagram, TikTok, and Twitter to promote ticket sales, artists, and event activities.

2. Print Ads: \$5,000

- Local newspapers and magazines (e.g., D Magazine, McKinney Courier) for event promotion.

- Flyers and posters distributed in local businesses and community centers.

3. Radio Promotions: \$4,000

- Local radio stations for promotional spots and interviews with artists or organizers.

4. Event Signage: \$3,500

- Design and production of event banners, directional signage, and promotional materials for on-site visibility.

5. Community Partnerships: \$3,000

- Collaborate with local businesses and organizations for cross-promotions and sponsorship recognition.

6. Promotional Merchandise: \$2,500

- Branded merchandise (e.g., T-shirts, tote bags) to be sold or given as giveaways during the festival.

7. Interactive Experiences: \$2,500

- Materials and supplies for the "Burn Book" positivity station and photo booth props.

Summary

This marketing and promotional plan is designed to maximize visibility and engagement for the Rooted In Rhythm: Positively Pink Edition event. With a comprehensive timeline and a budget of \$32,500, we aim to create a successful festival that celebrates creativity and supports a vital cause.

Millennial Maven Creative Foundation

Fiscal Year ending:		Current Year		Next Year	
		12/31/2025	%	12/31/2026	%
REVENUE AND SUPPORT					
Revenue	Program Fees	\$0.00	0%	\$100,000.00	13%
	Seminars	\$0.00	0%	\$9,500.00	1%
	Product sales	\$0.00	0%	\$15,000.00	2%
	Membership	\$0.00	0%	\$0.00	0%
	Facility rental	\$0.00	0%	\$0.00	0%
	Consulting/training	\$0.00	0%	\$8,000.00	1%
Support	Foundation and Corpor	\$72,500.00	43%	\$450,000.00	59%
	Sponsorships	\$20,000.00	12%	\$100,000.00	13%
	Contributions and Don	\$49,681.01	30%	\$75,000.00	10%
Other	Events and Fundraising	\$26,191.00	16%	\$100,000.00	13%
	Interest		0%	\$0.00	0%
	All Other		0%	\$0.00	0%
TOTAL INCOME		\$168,372.01	100%	\$757,500.00	100%
EXPENSES					
			0%		0%
	Payroll	\$0.00	0%	\$75,000.00	10%
	Payroll Taxes	\$0.00	0%	\$25,000.00	3%
	Health Benefits	\$500.00	0%	\$12,500.00	2%
	Other Benefits	\$0.00	0%	\$15,000.00	2%
Subtotal Personnel		\$500.00	0%	\$127,500.00	17%
	Program Supplies	\$13,000.00	8%	\$180,000.00	24%
	Board Expense	\$2,250.00	1%	\$3,500.00	0%
	Travel	\$10,000.00	6%	\$37,500.00	5%
	Office Supplies	\$10,000.00	6%	\$20,000.00	3%
	Utilities	\$1,500.00	1%	\$2,750.00	0%
	Marketing and Promotio	\$15,345.00	9%	\$30,000.00	4%
	Insurance: Liability/Eve	\$1,200.00	1%	\$2,500.00	0%
	Accounting/Legal	\$3,000.00	2%	\$3,000.00	0%
	Rooted In Rhythm	\$57,620.00	34%	\$97,500.00	13%
	Summer Camp (Creativ	\$8,750.00	5%	\$78,000.00	10%
	Empower To Prosper	\$5,000.00	3%	\$50,000.00	7%
	Inside The Mind	\$13,750.00	8%	\$5,000.00	1%
	Rent	\$9,600.00	6%	\$9,600.00	1%
	Training/Education - St	\$4,500.00	3%	\$50,000.00	7%
	Internet/website	\$540.00	0%	\$750.00	0%
	Depreciation	\$0.00	0%	\$0.00	0%

Miscellaneous	\$6,500.00	4%	\$25,000.00	3%
TOTAL EXPENSES	\$163,055.00	97%	\$722,600.00	95%
NET SURPLUS (DEFICIT)	\$5,317.01	3%	\$34,900.00	5%
Budgeted Set Aside for Cash Reser	\$2,500.00	1%	\$75,000.00	10%

Form 990-N (e-Postcard)

Organization's name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no. Millennial Maven Creative Foundation 13601 Preston Rd #E565 Dallas TX 75240 US - Phone: 2054533420		Form 990-N For calendar year 2024
EMPLOYER IDENTIFICATION NUMBER (EIN) 99-0747051	WEBSITE ADDRESS www.millennialmavencf.com	Tax-exempt status
Principal officer's name and address Bridgette Jones 5769 W Arbor Hills Way The Colony TX 75056 US - Phone: 2054470097		Gross receipts are \$50,000 or less <input checked="" type="checkbox"/>
DBA names the organization uses		Organization has terminated or is terminating <input type="checkbox"/>
PERIOD STARTING 01/01/2024	PERIOD ENDING 12/31/2024	

Profit and Loss

Millennial Maven Creative Foundation

January-December, 2025

DISTRIBUTION ACCOUNT	TOTAL
Income	
Donations	93,346.85
Grant	\$64,988.77
Non-Cash Grants (In-Kind Contribution)	13,500.00
Total for Grant	\$78,488.77
Total for Income	\$171,835.62
Gross Profit	\$171,835.62
Expenses	
Advertising & marketing	19,244.70
Building & land rent	8,073.71
Commissions & fees	50.00
Contract labor	112,394.15
Contributions to charities	22,904.06
Dues and Subscriptions	3,817.83
Employee benefits	
Health & accident plans	734.14
Total for Employee benefits	\$734.14
Equipment rental	8,263.39
Event Space and Venue Rental	2,077.22
Events, Workshops & Conferences	6,627.59
General business expenses	
Bank fees & service charges	193.95
Uniform	256.70
Total for General business expenses	\$450.65
Insurance	703.00
Meals	\$6,494.55
Travel meals	525.34
Total for Meals	\$7,019.89
Office expenses	
Office supplies	1,658.17
Total for Office expenses	\$1,658.17
Professional Services	
Accounting fees	4,495.00
Total for Professional Services	\$4,495.00
Supplies	9,121.22
Taxes and Licenses	75.00
Travel	\$2,651.72
Airfare	277.43
Car Rental	1,607.48
Hotel and Lodging	10,688.35
Rideshare & Taxis	120.35
Total for Travel	\$15,345.33

Profit and Loss

Millennial Maven Creative Foundation

January-December, 2025

DISTRIBUTION ACCOUNT	TOTAL
Utilities	
Internet	537.91
Phone	279.08
Total for Utilities	\$816.99
Total for Expenses	\$223,872.04
Net Operating Income	-\$52,036.42
Other Income	
Other income	
Settlement Income	15,000.00
Total for Other income	\$15,000.00
Total for Other Income	\$15,000.00
Other Expenses	
Home office	
Rent	806.45
Total for Home office	\$806.45
Vehicle expenses	
Parking & tolls	948.46
Vehicle gas & fuel	299.01
Vehicle repairs	368.46
Vehicle wash & road services	40.00
Total for Vehicle expenses	\$1,655.93
Total for Other Expenses	\$2,462.38
Net Other Income	\$12,537.62
Net Income	-\$39,498.80



Department of the Treasury
Internal Revenue Service
Tax Exempt and Government Entities
P.O. Box 2508
Cincinnati, OH 45201

MILLENNIAL MAVEN CREATIVE FOUNDATION
13601 PRESTON RD E565
DALLAS, TX 75240

Date:
04/26/2024
Employer ID number:
99-0747051
Person to contact:
Name: Customer Service
ID number: 31954
Telephone: 877-829-5500
Accounting period ending:
December 31
Public charity status:
170(b)(1)(A)(vi)
Form 990 / 990-EZ / 990-N required:
Yes
Effective date of exemption:
January 17, 2024
Contribution deductibility:
Yes
Addendum applies:
No
DLN:
26053513003344

Dear Applicant:

We're pleased to tell you we determined you're exempt from federal income tax under Internal Revenue Code (IRC) Section 501(c)(3). Donors can deduct contributions they make to you under IRC Section 170. You're also qualified to receive tax deductible bequests, devises, transfers or gifts under Section 2055, 2106, or 2522. This letter could help resolve questions on your exempt status. Please keep it for your records.

Organizations exempt under IRC Section 501(c)(3) are further classified as either public charities or private foundations. We determined you're a public charity under the IRC Section listed at the top of this letter.

If we indicated at the top of this letter that you're required to file Form 990/990-EZ/990-N, our records show you're required to file an annual information return (Form 990 or Form 990-EZ) or electronic notice (Form 990-N, the e-Postcard). If you don't file a required return or notice for three consecutive years, your exempt status will be automatically revoked.

If we indicated at the top of this letter that an addendum applies, the enclosed addendum is an integral part of this letter.

For important information about your responsibilities as a tax-exempt organization, go to www.irs.gov/charities. Enter "4221-PC" in the search bar to view Publication 4221-PC, Compliance Guide for 501(c)(3) Public Charities, which describes your recordkeeping, reporting, and disclosure requirements.

Sincerely,

Stephen A. Martin
Director, Exempt Organizations
Rulings and Agreements

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.)		
	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 checked="" 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 type="checkbox"/> Other (see instructions) _____	4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3): Exempt payee code (if any) _____ 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.	Requester's name and address (optional)	
	6	City, state, and ZIP code		
	7	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 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									

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:

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 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
3. I am a U.S. citizen or other U.S. person (defined below); and
4. 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
			04/14/2026

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

must obtain your correct taxpayer identification number (TIN), which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (interest earned or paid).
- Form 1099-DIV (dividends, including those from stocks or mutual funds).
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds).
- Form 1099-NEC (nonemployee compensation).
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers).
- Form 1099-S (proceeds from real estate transactions).
- Form 1099-K (merchant card and third-party network transactions).
- Form 1098 (home mortgage interest), 1098-E (student loan interest), and 1098-T (tuition).
- Form 1099-C (canceled debt).
- Form 1099-A (acquisition or abandonment of secured property).

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

Caution: If you don't return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See *What is backup withholding*, later.

By signing the filled-out form, you:

1. Certify that the TIN you are giving is correct (or you are waiting for a number to be issued);
2. Certify that you are not subject to backup withholding; or
3. Claim exemption from backup withholding if you are a U.S. exempt payee; and
4. Certify to your non-foreign status for purposes of withholding under chapter 3 or 4 of the Code (if applicable); and
5. Certify that FATCA code(s) entered on this form (if any) indicating that you are exempt from the FATCA reporting is correct. See *What Is FATCA Reporting*, later, for further information.

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).

Establishing U.S. status for purposes of chapter 3 and chapter 4 withholding. Payments made to foreign persons, including certain distributions, allocations of income, or transfers of sales proceeds, may be subject to withholding under chapter 3 or chapter 4 of the Code (sections 1441–1474). Under those rules, if a Form W-9 or other certification of non-foreign status has not been received, a withholding agent, transferee, or partnership (payor) generally applies presumption rules that may require the payor to withhold applicable tax from the recipient, owner, transferor, or partner (payee). See Pub. 515, *Withholding of Tax on Nonresident Aliens and Foreign Entities*.

The following persons must provide Form W-9 to the payor for purposes of establishing its non-foreign status.

- In the case of a disregarded entity with a U.S. owner, the U.S. owner of the disregarded entity and not the disregarded entity.
- In the case of a grantor trust with a U.S. grantor or other U.S. owner, generally, the U.S. grantor or other U.S. owner of the grantor trust and not the grantor trust.
- In the case of a U.S. trust (other than a grantor trust), the U.S. trust and not the beneficiaries of the trust.

See Pub. 515 for more information on providing a Form W-9 or a certification of non-foreign status to avoid withholding.

Foreign person. If you are a foreign person or the U.S. branch of a foreign bank that has elected to be treated as a U.S. person (under Regulations section 1.1441-1(b)(2)(iv) or other applicable section for chapter 3 or 4 purposes), do not use Form W-9. Instead, use the appropriate Form W-8 or Form 8233 (see Pub. 515). If you are a qualified foreign pension fund under Regulations section 1.897(l)-1(d), or a partnership that is wholly owned by qualified foreign pension funds, that is treated as a non-foreign person for purposes of section 1445 withholding, do not use Form W-9. Instead, use Form W-8EXP (or other certification of non-foreign status).

Nonresident alien who becomes a resident alien. Generally, only a nonresident alien individual may use the terms of a tax treaty to reduce or eliminate U.S. tax on certain types of income. However, most tax treaties contain a provision known as a saving clause. Exceptions specified in the saving clause may permit an exemption from tax to continue for certain types of income even after the payee has otherwise become a U.S. resident alien for tax purposes.

If you are a U.S. resident alien who is relying on an exception contained in the saving clause of a tax treaty to claim an exemption from U.S. tax on certain types of income, you must attach a statement to Form W-9 that specifies the following five items.

1. The treaty country. Generally, this must be the same treaty under which you claimed exemption from tax as a nonresident alien.
2. The treaty article addressing the income.
3. The article number (or location) in the tax treaty that contains the saving clause and its exceptions.
4. The type and amount of income that qualifies for the exemption from tax.
5. Sufficient facts to justify the exemption from tax under the terms of the treaty article.

Example. Article 20 of the U.S.-China income tax treaty allows an exemption from tax for scholarship income received by a Chinese student temporarily present in the United States. Under U.S. law, this student will become a resident alien for tax purposes if their stay in the United States exceeds 5 calendar years. However, paragraph 2 of the first Protocol to the U.S.-China treaty (dated April 30, 1984) allows the provisions of Article 20 to continue to apply even after the Chinese student becomes a resident alien of the United States. A Chinese student who qualifies for this exception (under paragraph 2 of the first Protocol) and is relying on this exception to claim an exemption from tax on their scholarship or fellowship income would attach to Form W-9 a statement that includes the information described above to support that exemption.

If you are a nonresident alien or a foreign entity, give the requester the appropriate completed Form W-8 or Form 8233.

Backup Withholding

What is backup withholding? Persons making certain payments to you must under certain conditions withhold and pay to the IRS 24% of such payments. This is called "backup withholding." Payments that may be subject to backup withholding include, but are not limited to, interest, tax-exempt interest, dividends, broker and barter exchange transactions, rents, royalties, nonemployee pay, payments made in settlement of payment card and third-party network transactions, and certain payments from fishing boat operators. Real estate transactions are not subject to backup withholding.

You will not be subject to backup withholding on payments you receive if you give the requester your correct TIN, make the proper certifications, and report all your taxable interest and dividends on your tax return.

Payments you receive will be subject to backup withholding if:

1. You do not furnish your TIN to the requester;
2. You do not certify your TIN when required (see the instructions for Part II for details);
3. The IRS tells the requester that you furnished an incorrect TIN;
4. The IRS tells you that you are subject to backup withholding because you did not report all your interest and dividends on your tax return (for reportable interest and dividends only); or
5. You do not certify to the requester that you are not subject to backup withholding, as described in item 4 under "*By signing the filled-out form*" above (for reportable interest and dividend accounts opened after 1983 only).

Certain payees and payments are exempt from backup withholding. See *Exempt payee code*, later, and the separate Instructions for the Requester of Form W-9 for more information.

See also *Establishing U.S. status for purposes of chapter 3 and chapter 4 withholding*, earlier.

What Is FATCA Reporting?

The Foreign Account Tax Compliance Act (FATCA) requires a participating foreign financial institution to report all U.S. account holders that are specified U.S. persons. Certain payees are exempt from FATCA reporting. See *Exemption from FATCA reporting code*, later, and the Instructions for the Requester of Form W-9 for more information.

Updating Your Information

You must provide updated information to any person to whom you claimed to be an exempt payee if you are no longer an exempt payee and anticipate receiving reportable payments in the future from this person. For example, you may need to provide updated information if you are a C corporation that elects to be an S corporation, or if you are no longer tax exempt. In addition, you must furnish a new Form W-9 if the name or TIN changes for the account, for example, if the grantor of a grantor trust dies.

Penalties

Failure to furnish TIN. If you fail to furnish your correct TIN to a requester, you are subject to a penalty of \$50 for each such failure unless your failure is due to reasonable cause and not to willful neglect.

Civil penalty for false information with respect to withholding. If you make a false statement with no reasonable basis that results in no backup withholding, you are subject to a \$500 penalty.

Criminal penalty for falsifying information. Willfully falsifying certifications or affirmations may subject you to criminal penalties including fines and/or imprisonment.

Misuse of TINs. If the requester discloses or uses TINs in violation of federal law, the requester may be subject to civil and criminal penalties.

Specific Instructions

Line 1

You must enter one of the following on this line; **do not** leave this line blank. The name should match the name on your tax return.

If this Form W-9 is for a joint account (other than an account maintained by a foreign financial institution (FFI)), list first, and then circle, the name of the person or entity whose number you entered in Part I of Form W-9. If you are providing Form W-9 to an FFI to document a joint account, each holder of the account that is a U.S. person must provide a Form W-9.

- **Individual.** Generally, enter the name shown on your tax return. If you have changed your last name without informing the Social Security Administration (SSA) of the name change, enter your first name, the last name as shown on your social security card, and your new last name.

Note for ITIN applicant: Enter your individual name as it was entered on your Form W-7 application, line 1a. This should also be the same as the name you entered on the Form 1040 you filed with your application.

- **Sole proprietor.** Enter your individual name as shown on your Form 1040 on line 1. Enter your business, trade, or “doing business as” (DBA) name on line 2.

- **Partnership, C corporation, S corporation, or LLC, other than a disregarded entity.** Enter the entity’s name as shown on the entity’s tax return on line 1 and any business, trade, or DBA name on line 2.

- **Other entities.** Enter your name as shown on required U.S. federal tax documents on line 1. This name should match the name shown on the charter or other legal document creating the entity. Enter any business, trade, or DBA name on line 2.

- **Disregarded entity.** In general, a business entity that has a single owner, including an LLC, and is not a corporation, is disregarded as an entity separate from its owner (a disregarded entity). See Regulations section 301.7701-2(c)(2). A disregarded entity should check the appropriate box for the tax classification of its owner. Enter the owner’s name on line 1. The name of the owner entered on line 1 should never be a disregarded entity. The name on line 1 should be the name shown on the income tax return on which the income should be reported. For

example, if a foreign LLC that is treated as a disregarded entity for U.S. federal tax purposes has a single owner that is a U.S. person, the U.S. owner’s name is required to be provided on line 1. If the direct owner of the entity is also a disregarded entity, enter the first owner that is not disregarded for federal tax purposes. Enter the disregarded entity’s name on line 2. If the owner of the disregarded entity is a foreign person, the owner must complete an appropriate Form W-8 instead of a Form W-9. This is the case even if the foreign person has a U.S. TIN.

Line 2

If you have a business name, trade name, DBA name, or disregarded entity name, enter it on line 2.

Line 3a

Check the appropriate box on line 3a for the U.S. federal tax classification of the person whose name is entered on line 1. Check only one box on line 3a.

IF the entity/individual on line 1 is a(n) . . .	THEN check the box for . . .
• Corporation	Corporation.
• Individual or • Sole proprietorship	Individual/sole proprietor.
• LLC classified as a partnership for U.S. federal tax purposes or • LLC that has filed Form 8832 or 2553 electing to be taxed as a corporation	Limited liability company and enter the appropriate tax classification: P = Partnership, C = C corporation, or S = S corporation.
• Partnership	Partnership.
• Trust/estate	Trust/estate.

Line 3b

Check this box if you are a partnership (including an LLC classified as a partnership for U.S. federal tax purposes), trust, or estate that has any foreign partners, owners, or beneficiaries, and you are providing this form to a partnership, trust, or estate, in which you have an ownership interest. You must check the box on line 3b if you receive a Form W-8 (or documentary evidence) from any partner, owner, or beneficiary establishing foreign status or if you receive a Form W-9 from any partner, owner, or beneficiary that has checked the box on line 3b.

Note: A partnership that provides a Form W-9 and checks box 3b may be required to complete Schedules K-2 and K-3 (Form 1065). For more information, see the Partnership Instructions for Schedules K-2 and K-3 (Form 1065).

If you are required to complete line 3b but fail to do so, you may not receive the information necessary to file a correct information return with the IRS or furnish a correct payee statement to your partners or beneficiaries. See, for example, sections 6698, 6722, and 6724 for penalties that may apply.

Line 4 Exemptions

If you are exempt from backup withholding and/or FATCA reporting, enter in the appropriate space on line 4 any code(s) that may apply to you.

Exempt payee code.

- Generally, individuals (including sole proprietors) are not exempt from backup withholding.
- Except as provided below, corporations are exempt from backup withholding for certain payments, including interest and dividends.
- Corporations are not exempt from backup withholding for payments made in settlement of payment card or third-party network transactions.
- Corporations are not exempt from backup withholding with respect to attorneys’ fees or gross proceeds paid to attorneys, and corporations that provide medical or health care services are not exempt with respect to payments reportable on Form 1099-MISC.

The following codes identify payees that are exempt from backup withholding. Enter the appropriate code in the space on line 4.

1—An organization exempt from tax under section 501(a), any IRA, or a custodial account under section 403(b)(7) if the account satisfies the requirements of section 401(f)(2).

- 2—The United States or any of its agencies or instrumentalities.
- 3—A state, the District of Columbia, a U.S. commonwealth or territory, or any of their political subdivisions or instrumentalities.
- 4—A foreign government or any of its political subdivisions, agencies, or instrumentalities.
- 5—A corporation.
- 6—A dealer in securities or commodities required to register in the United States, the District of Columbia, or a U.S. commonwealth or territory.
- 7—A futures commission merchant registered with the Commodity Futures Trading Commission.
- 8—A real estate investment trust.
- 9—An entity registered at all times during the tax year under the Investment Company Act of 1940.
- 10—A common trust fund operated by a bank under section 584(a).
- 11—A financial institution as defined under section 581.
- 12—A middleman known in the investment community as a nominee or custodian.
- 13—A trust exempt from tax under section 664 or described in section 4947.

The following chart shows types of payments that may be exempt from backup withholding. The chart applies to the exempt payees listed above, 1 through 13.

IF the payment is for . . .	THEN the payment is exempt for . . .
• Interest and dividend payments	All exempt payees except for 7.
• Broker transactions	Exempt payees 1 through 4 and 6 through 11 and all C corporations. S corporations must not enter an exempt payee code because they are exempt only for sales of noncovered securities acquired prior to 2012.
• Barter exchange transactions and patronage dividends	Exempt payees 1 through 4.
• Payments over \$600 required to be reported and direct sales over \$5,000 ¹	Generally, exempt payees 1 through 5. ²
• Payments made in settlement of payment card or third-party network transactions	Exempt payees 1 through 4.

¹ See Form 1099-MISC, Miscellaneous Information, and its instructions.

² However, the following payments made to a corporation and reportable on Form 1099-MISC are not exempt from backup withholding: medical and health care payments, attorneys' fees, gross proceeds paid to an attorney reportable under section 6045(f), and payments for services paid by a federal executive agency.

Exemption from FATCA reporting code. The following codes identify payees that are exempt from reporting under FATCA. These codes apply to persons submitting this form for accounts maintained outside of the United States by certain foreign financial institutions. Therefore, if you are only submitting this form for an account you hold in the United States, you may leave this field blank. Consult with the person requesting this form if you are uncertain if the financial institution is subject to these requirements. A requester may indicate that a code is not required by providing you with a Form W-9 with "Not Applicable" (or any similar indication) entered on the line for a FATCA exemption code.

- A—An organization exempt from tax under section 501(a) or any individual retirement plan as defined in section 7701(a)(37).
- B—The United States or any of its agencies or instrumentalities.
- C—A state, the District of Columbia, a U.S. commonwealth or territory, or any of their political subdivisions or instrumentalities.
- D—A corporation the stock of which is regularly traded on one or more established securities markets, as described in Regulations section 1.1472-1(c)(1)(i).
- E—A corporation that is a member of the same expanded affiliated group as a corporation described in Regulations section 1.1472-1(c)(1)(i).

F—A dealer in securities, commodities, or derivative financial instruments (including notional principal contracts, futures, forwards, and options) that is registered as such under the laws of the United States or any state.

- G—A real estate investment trust.
- H—A regulated investment company as defined in section 851 or an entity registered at all times during the tax year under the Investment Company Act of 1940.
- I—A common trust fund as defined in section 584(a).
- J—A bank as defined in section 581.
- K—A broker.
- L—A trust exempt from tax under section 664 or described in section 4947(a)(1).
- M—A tax-exempt trust under a section 403(b) plan or section 457(g) plan.

Note: You may wish to consult with the financial institution requesting this form to determine whether the FATCA code and/or exempt payee code should be completed.

Line 5

Enter your address (number, street, and apartment or suite number). This is where the requester of this Form W-9 will mail your information returns. If this address differs from the one the requester already has on file, enter "NEW" at the top. If a new address is provided, there is still a chance the old address will be used until the payor changes your address in their records.

Line 6

Enter your city, state, and ZIP code.

Part I. Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. If you are a resident alien and you do not have, and are not eligible to get, an SSN, your TIN is your IRS ITIN. Enter it in the entry space for the Social security number. If you do not have an ITIN, see *How to get a TIN* below.

If you are a sole proprietor and you have an EIN, you may enter either your SSN or EIN.

If you are a single-member LLC that is disregarded as an entity separate from its owner, enter the owner's SSN (or EIN, if the owner has one). If the LLC is classified as a corporation or partnership, enter the entity's EIN.

Note: See *What Name and Number To Give the Requester*, later, for further clarification of name and TIN combinations.

How to get a TIN. If you do not have a TIN, apply for one immediately. To apply for an SSN, get Form SS-5, Application for a Social Security Card, from your local SSA office or get this form online at www.SSA.gov. You may also get this form by calling 800-772-1213. Use Form W-7, Application for IRS Individual Taxpayer Identification Number, to apply for an ITIN, or Form SS-4, Application for Employer Identification Number, to apply for an EIN. You can apply for an EIN online by accessing the IRS website at www.irs.gov/EIN. Go to www.irs.gov/Forms to view, download, or print Form W-7 and/or Form SS-4. Or, you can go to www.irs.gov/OrderForms to place an order and have Form W-7 and/or Form SS-4 mailed to you within 15 business days.

If you are asked to complete Form W-9 but do not have a TIN, apply for a TIN and enter "Applied For" in the space for the TIN, sign and date the form, and give it to the requester. For interest and dividend payments, and certain payments made with respect to readily tradable instruments, you will generally have 60 days to get a TIN and give it to the requester before you are subject to backup withholding on payments. The 60-day rule does not apply to other types of payments. You will be subject to backup withholding on all such payments until you provide your TIN to the requester.

Note: Entering "Applied For" means that you have already applied for a TIN or that you intend to apply for one soon. See also *Establishing U.S. status for purposes of chapter 3 and chapter 4 withholding*, earlier, for when you may instead be subject to withholding under chapter 3 or 4 of the Code.

Caution: A disregarded U.S. entity that has a foreign owner must use the appropriate Form W-8.

Part II. Certification

To establish to the withholding agent that you are a U.S. person, or resident alien, sign Form W-9. You may be requested to sign by the withholding agent even if item 1, 4, or 5 below indicates otherwise.

For a joint account, only the person whose TIN is shown in Part I should sign (when required). In the case of a disregarded entity, the person identified on line 1 must sign. Exempt payees, see *Exempt payee code*, earlier.

Signature requirements. Complete the certification as indicated in items 1 through 5 below.

1. Interest, dividend, and barter exchange accounts opened before 1984 and broker accounts considered active during 1983. You must give your correct TIN, but you do not have to sign the certification.

2. Interest, dividend, broker, and barter exchange accounts opened after 1983 and broker accounts considered inactive during 1983. You must sign the certification or backup withholding will apply. If you are subject to backup withholding and you are merely providing your correct TIN to the requester, you must cross out item 2 in the certification before signing the form.

3. Real estate transactions. You must sign the certification. You may cross out item 2 of the certification.

4. Other payments. You must give your correct TIN, but you do not have to sign the certification unless you have been notified that you have previously given an incorrect TIN. "Other payments" include payments made in the course of the requester's trade or business for rents, royalties, goods (other than bills for merchandise), medical and health care services (including payments to corporations), payments to a nonemployee for services, payments made in settlement of payment card and third-party network transactions, payments to certain fishing boat crew members and fishermen, and gross proceeds paid to attorneys (including payments to corporations).

5. Mortgage interest paid by you, acquisition or abandonment of secured property, cancellation of debt, qualified tuition program payments (under section 529), ABLE accounts (under section 529A), IRA, Coverdell ESA, Archer MSA or HSA contributions or distributions, and pension distributions. You must give your correct TIN, but you do not have to sign the certification.

What Name and Number To Give the Requester

For this type of account:	Give name and SSN of:
1. Individual	The individual
2. Two or more individuals (joint account) other than an account maintained by an FFI	The actual owner of the account or, if combined funds, the first individual on the account ¹
3. Two or more U.S. persons (joint account maintained by an FFI)	Each holder of the account
4. Custodial account of a minor (Uniform Gift to Minors Act)	The minor ²
5. a. The usual revocable savings trust (grantor is also trustee)	The grantor-trustee ¹
b. So-called trust account that is not a legal or valid trust under state law	The actual owner ¹
6. Sole proprietorship or disregarded entity owned by an individual	The owner ³
7. Grantor trust filing under Optional Filing Method 1 (see Regulations section 1.671-4(b)(2)(i)(A))**	The grantor*

For this type of account:	Give name and EIN of:
8. Disregarded entity not owned by an individual	The owner
9. A valid trust, estate, or pension trust	Legal entity ⁴
10. Corporation or LLC electing corporate status on Form 8832 or Form 2553	The corporation
11. Association, club, religious, charitable, educational, or other tax-exempt organization	The organization
12. Partnership or multi-member LLC	The partnership
13. A broker or registered nominee	The broker or nominee
14. 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
15. Grantor trust filing Form 1041 or under the Optional Filing Method 2, requiring Form 1099 (see Regulations section 1.671-4(b)(2)(i)(B))**	The trust

¹ 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.

² Circle the minor's name and furnish the minor's SSN.

³ You must show your individual name on line 1, and enter your business or DBA name, if any, on line 2. You may use either your SSN or EIN (if you have one), but the IRS encourages you to use your SSN.

⁴ 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.)

* **Note:** The grantor must also provide a Form W-9 to the trustee of the trust.

** For more information on optional filing methods for grantor trusts, see the Instructions for Form 1041.

Note: If no name is circled when more than one name is listed, the number will be considered to be that of the first name listed.

Secure Your Tax Records From Identity Theft

Identity theft occurs when someone uses your personal information, such as your name, SSN, or other identifying information, without your permission to commit fraud or other crimes. An identity thief may use your SSN to get a job or may file a tax return using your SSN to receive a refund.

To reduce your risk:

- Protect your SSN,
- Ensure your employer is protecting your SSN, and
- Be careful when choosing a tax return preparer.

If your tax records are affected by identity theft and you receive a notice from the IRS, respond right away to the name and phone number printed on the IRS notice or letter.

If your tax records are not currently affected by identity theft but you think you are at risk due to a lost or stolen purse or wallet, questionable credit card activity, or a questionable credit report, contact the IRS Identity Theft Hotline at 800-908-4490 or submit Form 14039.

For more information, see Pub. 5027, Identity Theft Information for Taxpayers.

Victims of identity theft who are experiencing economic harm or a systemic problem, or are seeking help in resolving tax problems that have not been resolved through normal channels, may be eligible for Taxpayer Advocate Service (TAS) assistance. You can reach TAS by calling the TAS toll-free case intake line at 877-777-4778 or TTY/TDD 800-829-4059.

Protect yourself from suspicious emails or phishing schemes.

Phishing is the creation and use of email and websites designed to mimic legitimate business emails and websites. The most common act is sending an email to a user falsely claiming to be an established legitimate enterprise in an attempt to scam the user into surrendering private information that will be used for identity theft.

The IRS does not initiate contacts with taxpayers via emails. Also, the IRS does not request personal detailed information through email or ask taxpayers for the PIN numbers, passwords, or similar secret access information for their credit card, bank, or other financial accounts.

If you receive an unsolicited email claiming to be from the IRS, forward this message to phishing@irs.gov. You may also report misuse of the IRS name, logo, or other IRS property to the Treasury Inspector General for Tax Administration (TIGTA) at 800-366-4484. You can forward suspicious emails to the Federal Trade Commission at spam@uce.gov or report them at www.ftc.gov/complaint. You can contact the FTC at www.ftc.gov/idtheft or 877-IDTHEFT (877-438-4338). If you have been the victim of identity theft, see www.IdentityTheft.gov and Pub. 5027.

Go to www.irs.gov/IdentityTheft to learn more about identity theft and how to reduce your risk.

Privacy Act Notice

Section 6109 of the Internal Revenue Code requires you to provide your correct TIN to persons (including federal agencies) who are required to file information returns with the IRS to report interest, dividends, or certain other income paid to you; mortgage interest you paid; the acquisition or abandonment of secured property; the cancellation of debt; or contributions you made to an IRA, Archer MSA, or HSA. The person collecting this form uses the information on the form to file information returns with the IRS, reporting the above information. Routine uses of this information include giving it to the Department of Justice for civil and criminal litigation and to cities, states, the District of Columbia, and U.S. commonwealths and territories for use in administering their laws. The information may also be disclosed to other countries under a treaty, to federal and state agencies to enforce civil and criminal laws, or to federal law enforcement and intelligence agencies to combat terrorism. You must provide your TIN whether or not you are required to file a tax return. Under section 3406, payors must generally withhold a percentage of taxable interest, dividends, and certain other payments to a payee who does not give a TIN to the payor. Certain penalties may also apply for providing false or fraudulent information.