

14th Annual Lung Cancer Symposium Thursday - Friday, March 12-13, 2026

The Warwick Hotel, Philadelphia, PA

COURSE CO-DIRECTORS:

Julie Barta, MD; Gregory Kane, MD; Sarah Gordon, DO; Erik Blomain MD, PhD

COURSE PLANNERS:

Nathaniel Evans III, MD, Prarthna Chandar, MD, Olugbenga Okusanya, MD, Tyler Grenda, MD, Ronald Myers, PhD, Brooke Ruane, CRNP, Teresa Giamboy, CRNP, Tamara LaCouture, MD, Christine Shusted, MPH, Stephenie Hummel, RRT, Katherine Stull, PA-C

Dear Representative,

On behalf of the Thomas Jefferson University Departments of Surgery, Medicine - Division of Pulmonary and Critical Care Medicine, Radiation Oncology, Medical Oncology, the Jane and Leonard Korman Respiratory Institute — Jefferson Health and National Jewish Health and at Thomas Jefferson University, we would like to formally invite your company to exhibit at the *14th Annual Lung Cancer Symposium* on **Thursday-Friday, March 12-13, 2026**. This program will be held at The Warwick Hotel in Philadelphia, PA.

As an exhibitor at this event, you will have the opportunity to personally share your product information directly with approximately 200 medical practitioners, primarily specialists, whose practices focus on screening, diagnosis, management, and treatment of lung cancer, representing hospital-based and office-based practices from the greater Philadelphia and tri-state area. There will be *four levels of exhibiting* opportunities: Platinum Showcase, Gold, Silver, and Bronze Levels, along with an opportunity for an in-person Product Theater.

To encourage attendee-exhibitor interaction, the attendees will be provided with an Exhibitor Score Card, with the names of all of the companies exhibiting at the conference. The attendees will have the opportunity to visit each of the exhibit booths to have one company representative sign their Score Card, with the possibility of winning one of several prizes at the end of the conference. Please note, exhibit funds will not be used toward the raffle prizes/giveaways as institutional and registrations funds will cover these expenses.

We are hopeful that you will join us as an exhibitor for this exceptional in person program and important networking event, an experience most appropriately deserving of your participation and support. Please register online at https://jefferson.cloud-cme.com/lung2026 to reserve a booth today! Please feel free to contact me with any questions you may have.

Thank you,

Cassie Morgan CPD Planner Thomas Jefferson University

*Please note that Sidney Kimmel Medical College/Thomas Jefferson University is not listed as a covered recipient on the CMS/Sunshine Act list. Questions about Jefferson's status may be directed to jeffersocpd@jefferson.edu.

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Exhibit Levels and Benefits			
PLATINUM LEVEL \$10,000 (limited to first 2 paid companies)	 Choice of Premium Exhibit Booth location in Exhibit Area (first come, first serve basis) 2 full page, color company advertisement in Exhibitor Directory (Due: February 27, 2026) Ad specifications: PDF format, letter size (8.5x11), no bleed, preferably with a border. Invitation to networking dinner with Course Directors & Faculty on March 11th Networking Lunch with selected Course Planners during the designated Lunch & Exhibits Prime exhibit location Individual company acknowledgement signage Acknowledgement posted online via a Virtual Exhibit Hall and emailed to all participants before and after the conference Special name badge designation Up to 6 company representatives 4 complimentary conference attendees for CE credit PowerPoint slideshow acknowledgement Company listing in printed Exhibitor Directory Included in On-Site Exhibitor Raffle (prize provided by Jefferson) Opted-In Attendee List (Attendees who gave permission for info to be shared) Two 6ft draped table 		
\$7,500 (limited to first 4 paid companies)	 1 full page, color company advertisement in Exhibitor Directory (Due: February 27, 2026) Ad specifications: PDF format, letter size (8.5x11), no bleed, preferably with a border. Networking Lunch with selected Course Planners during the designated Lunch & Exhibits Prime exhibit location Individual company acknowledgement signage Special name badge designation Up to 3 company representatives 3 complimentary conference attendees for CE credit PowerPoint slideshow acknowledgement Company listing in printed Exhibitor Directory Included in On-Site Exhibitor Raffle (prize provided by Jefferson) Opted-In Attendee List (Attendees who gave permission for info to be shared) One 6ft draped table 		
SILVER LEVEL \$4,500	 1 half page, black and white company advertisement in Exhibitor Directory (Due: February 27, 2026) Ad specifications: JPEGF format, letter size (8.5 by 5.5), no bleed, preferably with a border Up to 2 company representatives 2 complimentary conference attendees for CE credit PowerPoint slideshow acknowledgement Company listing in printed Exhibitor Directory Included in On-Site Exhibitor Raffle (prize provided by Jefferson) Opted-In Attendee List (Attendees who gave permission for info to be shared) One 6ft draped table 		
BRONZE LEVEL \$3,000	 1 company representatives at table PowerPoint slideshow acknowledgement Company listing in printed Exhibitor Directory Included in On-Site Exhibitor Raffle (prize provided by Jefferson) Opted-In Attendee List (Attendees who gave permission for info to be shared) One 6ft draped table 		

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Exhibitor Raffle and Score Card - BACK BY POPULAR DEMAND!

To encourage attendee-exhibitor interaction, the attendees will be provided with an Exhibitor Score Card, with the names of all of the companies exhibiting at the conference. The attendees will have the opportunity to visit each of the exhibit booths to have one company representative sign their Score Card, with the possibility of winning one of several prizes at the end of the conference. Please note exhibit monies received will not be used to purchase materials related to the Exhibitor Raffle as institutional and registration funds will cover these expenses.

Additional Benefits:

Networking Reception-

All Exhibitors are invited to partake in the exhibits and Networking Reception Program, from 3:30-5:00PM on March 12, 2026 immediately following the symposium, in the exhibit hall.

Product Theater Opportunities

Product Theaters provide a forum to gather and discuss issues on patient education, specific products and therapeutic areas with company representatives or your designees. Jefferson Office of CPD recognizes that Product Theaters will be promotional and may concentrate on a specific product or drug. These sessions are not approved for continuing education credits.

PRODUCT THEATER -\$10,000

*LIMITED TO TWO **COMPANIES***

Product theaters provide a focused, high-value live marketing opportunity for exhibitors to reach motivated professionals in a pre-scheduled, private session at the program. This opportunity is limited to a 30-minute session. Due to space constraints, it will be capped at 50 attendees per a session.

This is a live, in person opportunity where a basic AV set up of a screen; projector and microphone will be provided. Any additional AV requirements will be at the expense of your company.

- Product theaters will be advertised to registered conference attendees prior to the
- Companies may provide a 1 page digital flyer that will be sent to attendees ahead of the conference
- Product theaters will be advertised to registered conference attendees and faculty during the running slideshow in the conference room during breaks
- Companies may provide a physical flyer to be put out for attendees and faculty at check in

Available slots*:

- Thursday, March 12, 2026 12:15PM-12:45PM
- Friday, March 13, 2026 7:15AM-7:45AM

*Slot selections are based on who registers first. We cannot guarantee any slot until your registration is completed.

SEND US YOUR SUGGESTIONS!

If you have suggestions for an exhibit features or other advertising opportunities, please email Cassandra. Morgan@jefferson.edu Additional fees may apply.

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Conference Date	Thursday - Friday, March 12-13, 2026			
— Conjerence Date	The Warwick Hotel Rittenhouse Square	Phone: (215) 735-6000		
Conference Location				
	Representatives may begin set-up at 6:00AM on Thursday, March 12, 2026. Subject to change. Will confirm set-up time the week of the event. The exhibit hall will be open throughout the conference, however the following preliminary times are dedicated exhibit times where food and beverage will be served:			
Exhibit Location/ Times (Eastern Time)	Thursday, March 12, 2026 7:00AM - 8:00AM Registration, Continental Breakfast & Exhibits 9:55AM - 10:15AM Break & Exhibits 12:00PM - 1:00PM Lunch & Exhibits 3:30PM - 5:00PM Exhibits and Networking Reception			
	Friday, March 13, 2026 7:00AM - 7:50AM Registration, Continents 9:45AM - 10:05AM Break & Exhibits 11:40AM - 12:30PM Lunch & Exhibits 1:30PM - 2:00PM Break & Exhibits	al Breakfast & Exhibits		
Exhibitor Registration	https://jefferson.cloud-cme.com/lung2026			
Electrical Needs	Electrical needs should be communicated to Cassie Morgan via email at cassandra.morgan@jefferson.edu no later than February 20, 2026. After this date, we will try to accommodate any electrical request but may be unable to do so.			
Payment	All payments must be received no later than March 12, 2026. If a check is scheduled to come after that date, we will require a credit card on file ahead of time. Please make check payable to: Thomas Jefferson University Mail to: Thomas Jefferson University, Office of CPD Jefferson Alumni Hall 1020 Locust Street, Suite M-5 Philadelphia, PA 19107 *American Express, Visa and MasterCard also accepted.			
Shipping	Shipments will be accepted by The Warwick Hotel <u>no more than two days</u> prior to the conference. Be sure to include the following information when shipping your materials: Hold for Arrival - Attn: Rep's name, Company Name The Warwick Hotel Rittenhouse Square Philadelphia 220 S 17th St Philadelphia, PA 19103 Lung Cancer Symp - March 12-13, 2026 Package 1 of The hotel and the Office of CPD does not accept any liability for equipment, goods, displays or other materials which arrive unmarked or fail to arrive at the hotel. Each exhibiting company is responsible for insuring its property for loss or damage. All company representatives are solely responsible for coordinating return shipping at the conclusion of the conference with The Warwick Hotel representatives.			
Exhibit Rules	All in person exhibits must be tabletop or portable in nature not to exceed 6ft in width. Each inperson exhibit company will be provided a 6' x 30" draped table and chairs. Each exhibitor will be listed in the course exhibit directory, in the administrative slideshow and on conference posters. PLEASE NOTE: We will not be allowing multiple reps to switch out on the same day. You can however send different reps on day 1 and day 2. We will not be lenient with this policy and will turn away multiple reps on site. Exhibitors acknowledge that:			

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	Exhibitor is not furnishing commercial support for this conference, exhibitor is buying wirtual or in person exhibit space.		
	virtual or in person exhibit space. • Exhibitor activities are restricted to the allocated physical or virtual exhibit space at		
	the conference. Distribution of educational/promotional materials by exhibitors is		
	limited to their booth space in the exhibit area. Distribution of materials will not be		
	permitted anywhere else in the hall, in conference meeting space, or at the entrances		
	to the conference meeting space.		
	Advertisements and promotional materials will not be visible on the screen at the same time as the assertion content and not interleged between semputer windows or		
	time as the accredited content and not interleafed between computer windows or screens of the accredited content.		
	Advertising of any type is prohibited within the educational content.		
	Audio and Video: Advertisements and promotional materials will not be included within		
	the accredited content. There will be no 'commercial breaks'.		
	Exhibits are intended for informational purposes. Products may not be sold in the		
	virtual exhibit hall.		
	The recording (photographic, screen capture, audio and/or video) of the conference		
	and/or its attendees is prohibited.		
	The purpose of the exhibit is to further the education of meeting attendees through product and service displays and demonstrations. Exhibitor personnel may observe		
	should the conference space allow, but must refrain from any participation or		
	recording of any scientific sessions on that company's behalf.		
	The conference is not responsible for the security of exhibitors' materials. We suggest		
	that exhibitors leave nothing of value (e.g., laptop computer, audio-visual equipment,		
	etc.) unattended at any time in the exhibit hall.		
Cancellation by the	In the event that the Conference would have to be cancelled, the organizers are not responsible for		
Conference Organizers	any airfare, hotel, and/or other costs incurred by exhibitors. The conference will refund the full exhibit fee paid by the company.		
	The Parties acknowledge and agree that Exhibiting Company may be subject to Section 6002 of the		
	Affordable Care Act, which added Section 1128G to the Social Security Act, and its implementing		
Sunshine Act	regulations codified in 42 CFR 402 & 403 (collectively the "Sunshine Act").		
Sansinic Acc	Exhibiting companies are solely responsible for collecting any information about actions within their		
	exhibit space that constitutes a payment or transfer of value to a Covered Recipient that is		
	required to be reported under the Sunshine Act.		
	Requests for exhibitor fee refunds must be submitted in writing and received by the Office of CPD		
	before February 13, 2026 . There will be no refunds after this period. Cancellations notified before the one month period will incur a 10% cancelation fee. Exhibitors who fail to attend the		
	conference are responsible for the entire fee. All refunds will be processed after the conference.		
	Submit refund requests to:		
Exhibitor Refund	Office of CPD		
Policy	Thomas Jefferson University		
	Jefferson Alumni Hall		
	1020 Locust Street, Suite M-5		
	Philadelphia, PA 19107		
	Or by email to jefferson.edu - please include the activity name in the subject line.		
Questions?	Please contact Cassie Morgan at cassandra.morgan@jefferson.edu with any questions or concerns.		



14th Annual Lung Cancer Symposium

Presented by the Jane and Leonard Korman Respiratory Institute -Jefferson Health and National Jewish Health March 12, 2026 - March 13, 2026

Thursday, March 12, 2026 - DAY 1 - All times in EST- Preliminary Agenda - Subject to Change			
7:00AM-8:00AM Check in, Breakfast & Exhibits			
8:00AM-8:15AM	Welcome Address and Opening Remarks: Day 1	Julie Barta, MD, ATSF	
Theme: New Approaches to Radiation Therapy (Moderator: Erik Blomain, MD, PhD)			
8:15AM-9:00AM	Keynote: Radiation Therapy for Lung Cancer ^{1 2}	Robert Timmerman, MD, FASTRO, FACR	
9:00AM-9:20AM	Radiation Therapy for Oligometastatic Disease ²	Cecilia Jiang, MD	
9:20AM-9:40AM	Post-Radiation Imaging Changes and New Imaging Modalities for Lung Cancer Diagnosis and Treatment Effect: How to understand the evolving appearance of post SBRT imaging surveillance CE and PET ²	Maansi Parekh, MD	
9:40AM-9:55AM	Question and Answer Panel: Morning Speakers ¹²		
9:55AM-10:15AM	Break and Exhibits		
Th	neme: Technology on the Horizon & Al in Lung Cancer (Moderat	tor: Julie Barta, MD, ATSF)	
10:15AM-10:35AM	Radiology Manpower in the Era of Al ²	Elias Melhem, MD	
10:35AM-11:15AM	New Technology Updates in Lung Cancer Screening into 2035 ¹²	Julie Barta, MD, ATSF	
11:15AM-11:35AM	Integrating Genomic Data and Clinical Cancer Data Across the SKCCC Network ²	Christopher McNair, PhD	
11:35AM-11:50AM	Question and Answer Panel: Mid-Morning Speakers ¹²		
11:50AM-12:00PM	Introduction to Afternoon Sessions & Reception		
12:00PM-1:00PM	Lunch and Exhibits		
1:00PM-1:45PM	Keynote: Role of the Immune Microenvironment in Lung Carcinogenesis ²	Daniel H. Sterman, MD, FCCP, ATSF, DAABIP	
2:00PM-3:30PM	(3) Concurrent Breakout Tracks		
2:00PM-3:30PM	Track 1: Lung Cancer and Public Health (Moderator: Teres	sa Giamboy, CRNP, DNP)	
2:00PM-2:20PM	Public Health Tools for Evaluating Community Needs	Christine S. Shusted, MPH	
2:20PM-2:50PM	Combustible Cigarette and E-Cigarette Use and Cancer Fatalism in Philadelphia	Munjireen Sifat, PhD, MPH	
2:50PM-3:10PM	New Developments in Tobacco Treatment in Lung Cancer Screening	Brooke Ruane, CRNP	
3:10PM-3:30PM	Novel Opportunities for Cancer Screening: Leveraging ER Visits for Early Detection	Kristin Rising, MD, MSHP	
2:00PM-3:30PM	Track 2: Surgery (Moderator: Olugbenga Okusanya, MD)		
2:00PM-2:30PM	Current Debates in Thoracic Oncology: A Surgical Perspective ¹	Nathaniel Evans III, MD, FACS	
2:30PM-2:50PM	Surgical Options for Patients with Multiple Primary Lung Cancers ¹	Tyler Grenda, MD	
2:50PM-3:10PM	Why Does a Radiation Oncologist Speak in the Surgery Section? ¹	Erik Blomain, MD, PhD	
3:10PM-3:30PM	Optimizing the Patient Peri-Operative Experience ¹	Sung Whang, DNP, CRNP, MBA	
2:00PM-3:30PM	Track 3: Respiratory Therapy and Lung Cancer (Moderator: St		
	Respiratory Therapy Updates for Lung Cancer Patients	Jerin Juby, DMgt, RRT	
2:20PM-2:40PM	COPD Medication Updates	Melissa Ash, RRT-ACCS, RRT-NPS	
2:40PM-3:00PM	Transitioning Ventilated Patients from Acute Care Rehab	Stephanie Hummel, BS, RRT	
3:00PM-3:30PM	PFT & Patient Sputum Sampling	Julia Bachman, RRT	
3:30PM-5:00PM	Exhibits and Networking Reception		

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Presented by the Jane and Leonard Korman Respiratory Institute -Jefferson Health and National Jewish Health March 12, 2026 - March 13, 2026

Friday, March 13, 2026 - DAY 2 - All times in EST - Preliminary Agenda - Subject to Change				
7:00AM-7:50AM	Check in, Breakfast & Exhibits			
7:50AM-8:00AM	Opening Remarks: Day 2	Gregory Kane, MD, MACP		
Theme: Emerging Therapies (Moderator: Julie Barta, MD)				
8:00AM-8:45AM	Should All Thoracic Surgery Be Robotic? 12	John Jacob, MD		
8:45AM-9:05AM	Neoadjuvant, Perioperative, Adjuvant Treatments, Oh my: Role of the Medical Oncologist ²	Sarah Gordon, DO		
9:05AM-9:25AM	New Molecular Targets (and their drugs) Changing the Face of Lung Cancer Treatment ²	Tracey Evans, MD (invited)		
9:25AM-9:45AM	Question and Answer Panel: Morning Speakers 12			
9:45AM-10:05AM	Break and Exhibits			
	Theme: Molecular Updates & Immunotherapy (Moderator: Sa	rah Gordon, DO)		
10:05AM-10:50AM	Keynote: The Evolving Treatment Landscape for Patients with HER2 Alterations in Non-Small Cell Lung Cancer	Helena A. Yu, MD (invited)		
10:50AM-11:10 AM	Changes in the Treatment Paradigm of SCLC ²	Zachary French, MD		
11:10AM-11:25AM	What's Coming for Patients with KRAS Mutations and NSCLC ²	Sarah Gordon, DO		
11:25AM-11:40AM	Question and Answer Panel: Mid-Morning Speakers ¹²			
11:40AM-12:30PM	Lunch and Exhibits			
	Mock Tumor Board (Moderator: Sarah Gordon,	DO)		
12:30PM-1:30PM	Mock Tumor Board: Addressing Difficult Lung Cancer Cases ¹²	Panelists: Olugbenga Okusanya, MD Jayati Mallick, MD Prarthna Chandar MD Erik Blomain, MD, PhD Paras Lakhani, MD (invited/pending)		
	Break and Exhibits			
Theme: Looking to the Future: Evolving Risk Factors, Diagnostics, and Supportive Oncology (Moderator: Gregory Kane, MD, MACP)				
2:00PM-2:30PM	Latest Updates on New Interventional Pulmonology Tools ²	Prarthna Chandar, MD		
2:30PM-3:00PM	Cannabis and Oncology ²	Brooke Worster, MD		
3:00PM-3:20PM	You Found a Lung Nodule: So now what? 12	Gregory Kane, MD, MACP		
3:20PM-3:40PM	Climate Change and Evolving Lung Cancer Risks ¹	Julie Barta, MD, ATSF		
3:40PM-3:50PM	Question and Answer Panel: Afternoon Session Speakers ¹²			
3:50PM-4:00PM	Closing Remarks and Raffle Drawing	Gregory Kane, MD, MACP and Julie Barta, MD, ATSF		

¹ Eligible for PA Patient Safety & Risk Management Credit ² Eligible for Nursing Pharmacology Credit

Optional Pre-Conference Online Modules (for extra CE credit)			
38 minutes	Community Engaged Research to Reduce Tobacco Use Disparities	Lilianna Phan, PhD, MPH, MS	
53 minutes	Patient-Reported Outcomes in Lung Cancer Screening	Christopher Slatore, MD, MS	
16 minutes	Role of Radiation Oncology in Early Detection of Lung Cancer	Erik Blomain, MD, PhD	
17 minutes	Optimizing the Electronic Health Record to Improve Lung Cancer Screening Opportunities for Primary Care Populations	Bryan O'Connell, MD	
18 minutes	Transforming Lung Cancer Screening Through Artificial Intelligence in Thoracic Radiology	Paras Lakhani, MD	
10 minutes	Updates in Thoracic Surgery for Early-Stage Lung Cancer	Nathaniel R. Evans III, MD, FACS, FCCP	



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 quidance related to the purpose of Form W-9, see Purpose of Form, below, 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.) THOMAS JEFFERSON UNIVERSITY Business name/disregarded entity name, if different from above. က 3a Check the appropriate box for federal tax classification of the entity/individual whose name is entered on line 1. Check 4 Exemptions (codes apply only to Specific Instructions on page only one of the following seven boxes. certain entities, not individuals; see instructions on page 3): Individual/sole proprietor C corporation S corporation Partnership LLC. Enter the tax classification (C = C corporation, S = S corporation, P = Partnership) Exempt payee code (if any) Print or type. Note: Check the "LLC" box above and, in the entry space, enter the appropriate code (C, S, or P) for the tax Exemption from Foreign Account 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. Compliance Act (FATCA) reporting code (if any) NON-FOR-PROFIT 501C3 ✓ Other (see instructions) 3b If on line 3a you checked "Partnership" or "Trust/estate," or checked "LLC" and entered "P" as its tax classification, (Applies to accounts maintained and you are providing this form to a partnership, trust, or estate in which you have an ownership interest, check outside the United States.) this box if you have any foreign partners, owners, or beneficiaries. See instructions Address (number, street, and apt. or suite no.). See instructions. Requester's name and address (optional) 1101 MARKET STREET, SUITE 2004 6 City, state, and ZIP code PHILADELPHIA, PA 19107 7 List account number(s) here (optional) Taxpaver Identification Number (TIN) Part I Social security number 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. Employer identification number Note: If the account is in more than one name, see the instructions for line 1. See also What Name and 1 2 3 3 2 5 Number To Give the Requester for guidelines on whose number to enter. 5 6 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 Signature of Here U.S. person

Date

03/31/2025

Yevgeniy Shcherbakov, Acct. Manager

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