



## **Endocrine Update 2025**

February 3 – February 7, 2025

Waikoloa, HI

## COMMERCIAL SUPPORT PROSPECTUS



### Contents

- Welcome
- Dates, Location, and Program Faculty
- Benefits of Exhibit and Sponsorship
- Sponsorship Details
- Product Theater Details
- Exhibit Details
- Payment Information
- Travel Information

## COMMERCIAL SUPPORT PROSPECTUS

Greetings!

On behalf of the course directors, planning committee, and the Mayo Clinic School of Continuous Professional Development, we are pleased to announce the upcoming **Endocrine Update 2025** course! Please join us **February 3 – February 7, 2025**, in Waikoloa, HI at the Hilton Waikoloa Village.

Designed for endocrinologists, internists, advanced practice providers, and surgeons, this course addresses gaps in medical knowledge and barriers in clinical practice to improve the outcomes of patients with endocrine and metabolic disorders. This program will consist of lecture, small groups, and panel discussion formats covering best practices, barriers to optimal patient outcomes, and new approaches to the evaluation and management of complex and common endocrine disorders. In addition, this year's program will feature optional afternoon workshops on integrating emerging digital technologies into practice. We anticipate over 200 attendees for the course in 2025.

We invite your company to join us along with the world-renowned faculty and support this conference. Based on the level of support you are interested in providing, we can offer various levels of recognition. Companies that support this Mayo Clinic conference are acknowledged several ways, including the opportunity for an onsite exhibit, signage at the conference, and featured in conference announcements. Ample opportunities are provided during the conference for sponsors and exhibitors to network with attendees and to showcase their products and services. Mayo Clinic recognizes these types of educational programs would not be possible without your support. We invite you to participate in this educational activity with a sponsorship or as an exhibitor. Details are listed below. In support of ACCME guidelines, commercial support will be in a separate area from the educational activity. This event is open to multiple pharmaceutical companies.

To receive a guaranteed space for exhibiting and/or course sponsorship, please complete our letter of agreement Monday, December 9, 2024. For your convenience, Mayo Clinic's Tax ID is 41-6011702.

If you have any questions, please feel free to contact us.

Sincerely,

Mallory Hedquist

[Hedquist.mallory@mayo.edu](mailto:Hedquist.mallory@mayo.edu)

CME Specialist

## COMMERCIAL SUPPORT PROSPECTUS

### Dates, Location, Course Directors, Key Contact

#### Dates

Monday, February 3, 2025 – Friday, February 7, 2025

*Attendee Welcome Reception on Sunday, February 2.*

#### Location

Hilton Waikoloa Village

69-425 Waikoloa Beach Drive

Waikoloa, HI 96738

United States

#### Course Website

[CE.MAYO.EDU/ENDO2025](http://CE.MAYO.EDU/ENDO2025)

### Program Topics & Mayo Clinic Faculty

*(Subject to Change without Notice)*

#### Adrenal

- William Young JR, M.D.
- Travis J. McKenzie, M.D.
- Patrick J. Navin, M.B., B.Ch., B.A.O.

#### Bone

- Kurt A. Kennel, M.D.
- Jad Sfeir, M.D., M.S.

#### Diabetes

- Aoife M. Egan, M.B., B.Ch., Ph.D.
- Brittni A. Scruggs, M.D., Ph.D.
- Adrian Vella, M.D.

#### Gonads

- Alice Y. Chang, M.D., M.S.
- Daniela L. Stan, M.D.

#### Course Directors

- Travis J. McKenzie, M.D.
- Kalpana Muthusamy, M.B.B.S., M.D.
- Jad Sfeir, M.D., M.S.

#### Key Contact

KRIS JONES

Mayo Clinic School of Continuous Professional Development  
(MCSCPD)

200 First St SW, Plummer 2-60

Rochester, MN 55905

[JONES.KRISTEN@MAYO.EDU](mailto:JONES.KRISTEN@MAYO.EDU)

#### Obesity

- Todd A. Kellogg, M.D.
- Manpreet S. Mundi, M.D.
- Kalpana Muthusamy, M.B.B.S., M.D.

#### Pituitary

- Dana Erickson, M.D.
- Jamie J Van Gompel, M.D.
- Susan L. Samson, M.D., Ph.D.

#### Surgery

- Melanie L. Lyden, M.D.

#### Thyroid

- Juan P. Brito Campana, M.B.B.S.
- Diana S. Dean, M.D.
- Marius N. Stan, M.D.

## COMMERCIAL SUPPORT PROSPECTUS

### **Benefits of Exhibiting and Sponsoring**

Technical and educational exhibits provide a professional and educational environment in which healthcare providers can receive demonstrations, view products and services and discuss the clinical and surgical uses of these products and services including how they may improve the quality of care for patients seeking care. Additionally, the exhibits enhance the educational content of the meeting helping to provide quality continuing medical education.

#### Benefits:

- Interact face-to-face with influential decision makers and numerous medical professionals in the field,
- Build visibility for your company in a competitive marketplace,
- Expand your customer base and strengthen existing customer relationships,
- Introduce new products and services,
- Additional advertisement opportunities to expand reach and further socialize with attendees.



## COMMERCIAL SUPPORT PROSPECTUS

### Sponsorship Opportunities

| <b>PLATINUM</b>  | <b>GOLD</b>   | <b>SILVER</b>  | <b>BRONZE</b>  |
|--|---|--|--|
| <b>\$25,000</b>  | <b>\$18,000</b>   | <b>\$12,000</b>  | <b>\$7,000</b>   |
| <b>Attendee Reception Sponsor</b><br><i>(Exclusive Opportunity)</i><br>Company signage and representation at attendee reception.   | <b>Charging Station Sponsor</b><br><i>(Up to Three Available)</i><br>Company signage at one of three charging stations.   | <b>Refreshment Break Sponsor</b><br><i>(Five Available)</i><br>Company signage at one of the refreshment breaks.   | <b>Daily Coffee Sponsor</b><br><i>(Five Available)</i><br>Company signage at the coffee station.   |
| Platinum sponsors may opt to support the <i>Attendee Reception</i> or be acknowledged as a <i>General Sponsor</i> of the course.   | Gold sponsors may opt to support a <i>Charging Station</i> or be acknowledged as a <i>General Sponsor</i> of the course.  | Silver sponsors may opt to support a <i>Refreshment Break</i> or be acknowledged as a <i>General Sponsor</i> of the course.  | Bronze sponsors may opt to support <i>Daily Coffee</i> or be acknowledged as a <i>General Sponsor</i> of the course.   |
| Platinum sponsors will receive: <ul style="list-style-type: none"> <li>• <b>Four</b> complimentary registrations,</li> <li>• Signage at attendee reception if applicable,</li> <li>• One 6' exhibit table for two representatives,</li> <li>• Sponsorship acknowledgement at course through signage and announcements,</li> <li>• Access to networking opportunities throughout the course,</li> <li>• Receive a list of conference attendees on the first day of the course.</li> </ul> | Gold sponsors will receive: <ul style="list-style-type: none"> <li>• <b>Three</b> complimentary registrations,</li> <li>• Signage at charging station if applicable,</li> <li>• One 6' exhibit table for two representatives,</li> <li>• Sponsorship acknowledgement at course through signage and announcements,</li> <li>• Access to networking opportunities throughout the course,</li> <li>• Receive a list of conference attendees on the first day of the course.</li> </ul> | Silver sponsors will receive: <ul style="list-style-type: none"> <li>• <b>Two</b> complimentary registrations,</li> <li>• Signage near refreshment break on designated day,</li> <li>• One 6' exhibit table for two representatives,</li> <li>• Sponsorship acknowledgement at course through signage and announcements,</li> <li>• Access to networking opportunities throughout the course,</li> <li>• Receive a list of conference attendees on the first day of the course.</li> </ul> | Bronze sponsors will receive: <ul style="list-style-type: none"> <li>• <b>One</b> complimentary registration,</li> <li>• Signage near coffee station for one day,</li> <li>• One 6' exhibit table for two representatives,</li> <li>• Sponsorship acknowledgement at course through signage and announcements,</li> <li>• Access to networking opportunities throughout the course,</li> <li>• Receive a list of conference attendees on the first day of the course.</li> </ul> |

Sponsorships range from \$7,000 to \$25,000 and feature various perks please email and Kris Jones, [jones.kristen@mayo.edu](mailto:jones.kristen@mayo.edu), for more information on alternative or exclusive opportunities.

A signed letter of agreement is required to secure your sponsorship, this agreement form will be sent after sponsorship details are agreed upon. Email Kris Jones, [jones.kristen@mayo.edu](mailto:jones.kristen@mayo.edu), to secure your sponsorship.

## COMMERCIAL SUPPORT PROSPECTUS

### **Non-CME Educational Session** (Product Theater)

**\$30,000** 40-minutes, two available

**\$25,000** 30-minutes, one available

A Non-CME Educational Session or Product Theater provides an opportunity for an organization to speak to attendees and faculty of the course during a break time. These sessions may be focused on either a product/device or an educational topic that is relevant to both the course and the company.

Accepted sessions will feature an opportunity to speak on Tuesday (2/4/24), Wednesday (2/5/24), or Thursday (2/6/24) after the morning session concludes. This is a Promotional Symposium (Non-CME Event). Mayo Clinic will provide basic food and beverage; premium food and beverage options are available for an additional fee. Nonaccredited programs such as these are independently developed and directly sponsored by industry and are presented in an educational format that will provide insight on new or controversial developments.

All sessions will receive the following:

- **Four** complimentary registrations,
- One 6' exhibit table for two representatives,
- Acknowledgement at course through signage and announcements,
- Access to networking opportunities throughout the course,
- Receive a list of conference attendees on the first day of the conference.

The Planning Committee reserves the right to review all submissions before final agreements have been executed. Companies are encouraged to speak on educational topics in addition to products. Please note, audio/visual equipment and fees are the responsibility of the industry supporter.

**A signed letter of agreement is required to secure your non-CME educational session (product theater), this agreement form will be sent after details are agreed upon. Email Kris Jones, [jones.kristen@mayo.edu](mailto:jones.kristen@mayo.edu), for information and to confirm your session.**

## COMMERCIAL SUPPORT PROSPECTUS

### Exhibit Opportunity

**\$3,000.00**

Exhibit tables offer an opportunity for company representatives to engage with attendees and faculty during break times of the course. All exhibits include:

- One 6' exhibit table for two representatives,
- Acknowledgement at course through signage and announcements,
- Access to networking opportunities throughout the course,
- Receive a list of conference attendees on the first day of the course.

[Click here to secure your exhibit table](#)

*A signed letter of agreement is required to secure your exhibit space, space is limited.*

### Exhibit Hours

Set Up: Sunday, February 2 – TBD

Monday, February 3 – Breakfast and Refreshment Breaks *exact schedule forthcoming.*

Tuesday, February 4 – Breakfast and Refreshment Breaks *exact schedule forthcoming.*

Wednesday, February 5 – Breakfast and Refreshment Breaks *exact schedule forthcoming.*

Thursday, February 6 – Breakfast and Refreshment Breaks *exact schedule forthcoming.*

Friday, February 7 – Breakfast and Refreshment Breaks *exact schedule forthcoming.*

Tear Down: All materials must be removed by 1:30pm on Friday, February 7, 2025.



## COMMERCIAL SUPPORT PROSPECTUS

### Payment Information

Make check payable to:

Mayo Clinic – MCSCPD  
200 First St SW, Plummer 2-60  
Attn: Kris Jones  
Rochester, MN 55905  
Reference: ENDOCRINE 2025

Credit Card payments:

To pay by credit card, [use this form](#) (online form for exhibitor payments only) or call 800-323-2688.  
Reference: ENDOCRINE 2025 – 25R00499

---

### Travel Information

The Hilton Waikoloa Village has reserved a limited block of guest rooms at a special group rate ranging from \$339.00 to \$469.00/night (USD) plus a daily resort fee of \$35.00 and all applicable taxes. Group rates apply three days prior to and three days after the course dates, based on group room availability. To ensure accommodations at the discounted rate, make your reservations directly with the hotel before the block is full or by December 31, 2024, whichever comes first.

Reservations can be made [directly in the room block online](#).

Mandatory resort fee of \$35.00 (USD), plus taxes, includes:

- Internet access in your room
- Hawaiian Culture Classes – *Including Ukelele, Lei Making, and Hula Lessons*
- Unlimited movie rentals (limit two checked out at any given time)
- Local, toll-free, and credit card calls (No access fee)
- Complimentary 15-minute photo session and souvenir keepsake
- 20% discount on beach toys at the saltwater lagoon
- Keiki Pool Activities & Scavenger Hunt (Schedule listed on the back of the resort activities guide)
- Fitness or Yoga Class at the Khala Spa (Space is limited, reservations are recommended by contacting Kohala Spa at extension 1228)
- \$10 off Hawaii Nautical sailings on the spirit of Aloha catamaran from Anaeho'omalū Bay.



## Endocrine Update 2025

February 3 – 7, 2025

Waikoloa Beach, HI

Live and Livestream

All Times Listed in Hawaiian Aleutian Time

| Monday, February 3, 2025  |   |
|---|---|
| 7:00am  | Registration and Breakfast  |
| 7:45am  | <b>Welcome and Course Overview</b><br><i>Course Directors</i>   |
| <b>Adrenal</b><br>Moderator: <i>Kalpana Muthusamy, M.B.B.S., M.D.</i>                                 |   |
| 8:00am  | <b>Approach to the Patient with “Spells”</b><br><i>William Young Jr., M.D.</i>  |
| 8:30am  | <b>Primer in Adrenal Nodule Imaging</b><br><i>Patrick J. Navin, M.B., B.Ch., B.A.O.</i>   |
| 9:00am  | <b>Adrenal Nodule: Endocrine and Surgical Perspectives</b><br><i>Travis J. McKenzie, M.D.</i><br><i>William Young Jr., M.D.</i>           |
| 10:00am   | Refreshment Break   |
| <b>Weight Management and Bariatric Surgery</b><br>Moderator: <i>Kalpana Muthusamy, M.B.B.S., M.D.</i> |   |
| 10:20am   | <b>Post Bariatric Anatomical Complications: When to Consider and How to Evaluate</b><br><i>Todd A. Kellogg, M.D.</i>                      |
| 10:50am   | <b>Weight Regain after Bariatric Surgery</b><br><i>Manpreet S. Mundi, M.D.</i>  |
| 11:20am   | <b>Role of Bariatric Surgery in the Era of Anti-Obesity Medications</b><br><i>Todd A. Kellogg, M.D.</i><br><i>Manpreet S. Mundi, M.D.</i> |
| 12:20pm   | Adjourn   |



## Endocrine Update 2025

February 3 – 7, 2025

Waikoloa Beach, HI

Live and Livestream

All Times Listed in Hawaiian Aleutian Time

| Tuesday, February 4, 2025                                      |  |
|--|--|
| 7:00am   | <b>Breakfast Roundtable Discussions with Faculty – Onsite Only</b><br><i>William Young Jr., M.D. – Adrenal</i><br><i>Todd A. Kellogg, M.D. – Bariatric Surgery</i><br><i>Manpreet S. Mundi, M.D. – Obesity</i><br><i>Dana Erickson, M.D. – Pituitary</i><br><i>Jamie J. Van Gompel, M.D. – Pituitary surgery</i> |
| <b>Pituitary</b><br>Moderator: <i>Jad Sfeir, M.D., M.S.</i>    |  |
| 8:00am   | <b>Craniopharyngioma: Medical and Surgical Perspectives</b><br><i>Dana Erickson, M.D.</i><br><i>Jamie J. Van Gompel, M.D.</i>  |
| 9:00am   | <b>Pituitary Cushing Symposium</b><br><i>Dana Erickson, M.D.</i><br><i>Susan L. Samson, M.D., Ph.D.</i><br><i>Jamie J. Van Gompel, M.D.</i>  |
| 10:00am  | Refreshment Break  |
| <b>Diabetes (I)</b><br>Moderator: <i>Jad Sfeir, M.D., M.S.</i> |  |
| 10:20am  | <b>Managing Hyperglycemia and Diabetes in Transplant Recipients</b><br><i>Pankaj Shah, M.D.</i>  |
| 10:50am  | <b>Islet Cell Function Restoration</b><br><i>Adrian Vella, M.D.</i>  |
| 11:20am  | <b>Diabetes Technology Primer</b><br><i>Aoife M. Egan, M.B., B.Ch., Ph.D.</i><br><i>Anna L. Espinoza, R.N., CDCES</i><br><i>Jada K. Hougen, M.S.N., R.N., CDCES</i><br><i>Kalpana Muthusamy, M.B.B.S., M.D.</i>  |
| 12:20pm  | Adjourn  |
| Industry Lunch   |  |



## Endocrine Update 2025

February 3 – 7, 2025

Waikoloa Beach, HI

Live and Livestream

All Times Listed in Hawaiian Aleutian Time

| Wednesday, February 5, 2025        |  |  |  |
|------------------------------------|--|--|--|
| 7:00am                             | <b>Breakfast Roundtable Discussions with Faculty - Onsite Only</b><br>Susan L. Samson, M.D., Ph.D. – Pituitary<br>Caroline J. Davidge-Pitts, M.B., B.Ch. – Transgender health<br>Travis J. McKenzie, M.D. – Adrenal Surgery<br>Pankaj Shah, M.D. – Diabetes<br>Robert A. Wermers, M.D. – Parathyroid/Bone<br>Sumit Bhagra, M.D. – Endocrine practice |  |  |
| 8:00am                             | <b>F.J. Service Memorial Lecture: Hypoglycemia</b><br>Diva D. De León-Crutchlow, M.D., M.S.C.E., Children’s Hospital of Philadelphia   |  |  |
| Concurrent Small Group Sessions I  |  |  |  |
|                                    | General Session  | Room 1   | Room 2   |
| 9:00am                             | <b>PCOS</b><br>Alice Y. Chang,<br>M.D., M.S.   | <b>Interpretation of Testing in the Transgender Population</b><br>Caroline J. Davidge-Pitts, M.B., B.Ch. | <b>Diabetes Technology Hands-On Workshop</b><br>Aoife M. Egan, M.B., B.Ch., Ph.D.<br>Anna L. Espinoza, R.N., CDCES<br>Jada K. Hougen, M.S.N., R.N., CDCES<br>Kalpana Muthusamy, M.B.B.S., M.D. |
| 10:00am                            | <b>PCOS</b><br>Alice Y. Chang,<br>M.D., M.S.   | <b>Interpretation of Testing in the Transgender Population</b><br>Caroline J. Davidge-Pitts, M.B., B.Ch. | <b>Diabetes Technology Hands-On Workshop</b><br>Aoife M. Egan, M.B., B.Ch., Ph.D.<br>Anna L. Espinoza, R.N., CDCES<br>Jada K. Hougen, M.S.N., R.N., CDCES<br>Kalpana Muthusamy, M.B.B.S., M.D. |
| 10:45am                            | Refreshment Break  |  |  |
| Concurrent Small Group Sessions II |  |  |  |
|                                    | General Session  | Room 1   | Room 2   |
| 11:05am                            | <b>Hormone Replacement Therapy in Breast Cancer Survivors</b><br>Daniela L. Stan,<br>M.D.  | <b>Medical Management of Acromegaly</b><br>Susan L. Samson,<br>M.D., Ph.D.                               | <b>Coding and Efficiency in Endocrine Practice</b><br>Sumit Bhagra, M.D.   |
| 12:00pm                            | <b>Hormone Replacement Therapy in Breast Cancer Survivors</b><br>Daniela L. Stan,<br>M.D.  | <b>Medical Management of Acromegaly</b><br>Susan L. Samson,<br>M.D., Ph.D.                               | <b>Coding and Efficiency in Endocrine Practice</b><br>Sumit Bhagra, M.D.   |
| 12:45pm                            | Adjourn  |  |  |
|                                    | Industry Lunch   |  |  |



## Endocrine Update 2025

February 3 – 7, 2025

Waikoloa Beach, HI

Live and Livestream

All Times Listed in Hawaiian Aleutian Time

| Thursday, February 6, 2025                                       |   |
|--|---|
| 7:00am   | <b>Breakfast Roundtable Discussions with Faculty - Onsite Only</b><br><i>Alice Y. Chang, M.D., M.S. – Adrenal</i><br><i>Aoife M. Egan, M.B., B.Ch., Ph.D. – Diabetes</i><br><i>Melanie L. Lyden, M.D. and Stephen D. Cassivi, M.D., M.S. – Parathyroid surgery</i><br><i>Kurt A. Kennel, M.D. – Parathyroid/Bone</i><br><i>John J. Schmitz, M.D. – Thyroid ultrasonography</i><br><i>Marius N. Stan, M.D. - Thyroid</i>   |
| <b>Parathyroid</b><br>Moderator: <i>Travis J. McKenzie, M.D.</i> |   |
| 8:00am   | <b>Evaluating Familial Hypocalciuric Hypercalcemia</b><br><i>Melanie L. Lyden, M.D.</i>   |
| 8:30am   | <b>Approach to Mediastinal Parathyroid</b><br><i>Stephen D. Cassivi, M.D., M.S.</i>   |
| 9:00am   | <b>Ethanol Ablation for Parathyroid Adenomas</b><br><i>John J. Schmitz, M.D.</i><br><i>Robert A. Wermers, M.D.</i>  |
| 10:00am  | Refreshment Break   |
| <b>Diabetes (II)</b><br>Moderator: <i>Jad Sfeir, M.D., M.S.</i>  |   |
| 10:20am  | <b>Cardiovascular Risk in Diabetes</b><br><i>Aoife M. Egan, M.B., B.Ch., Ph.D.</i>  |
| 10:50am  | <b>Diabetic Retinopathy</b><br><i>Brittini A. Scruggs, M.D., Ph.D.</i>  |
| 11:20am  | <b>Incorporating Patient Values in the Diabetes Prescription</b><br><i>Victor M. Montori, M.D.</i>  |
| 11:50am  | Adjourn   |
| 12:00pm  | Industry Lunch  |
| 1:30pm   | <b>Special Workshop: Artificial Intelligence in Endocrinology (Separate Registration Required)</b><br><b>Understanding Principles of AI in Medicine - Juan P. Brito Campana, M.B.B.S.</b><br><b>Learning to Use ChatGPT and Similar Tools - David Toro Tobon, M.D.</b><br><b>Applications of AI in Endocrinology and Ethical Considerations</b><br><b>Adrenal – Irina Bancos, M.D., M.S.</b><br><b>Thyroid – David Toro Tobon, M.D.</b><br><b>Obesity – Andres J. Acosta, M.D., Ph.D.</b><br><b>Diabetes – Sumit Bhagra, M.D.</b><br><b>Ethical Considerations Surrounding the Use of AI – Victor M. Montori, M.D.</b><br><b>Panel Discussion</b> |
| 5:00pm   | Adjourn   |



## Endocrine Update 2025

February 3 – 7, 2025

Waikoloa Beach, HI

Live and Livestream

All Times Listed in Hawaiian Aleutian Time

| Friday, February 7, 2025                            |   |
|---|---|
| 7:00am  | Breakfast   |
| <b>Metabolic Bone Diseases</b>                      |   |
| Moderator: <i>Kalpana Muthusamy, M.B.B.S., M.D.</i> |   |
| 8:00am  | <b>Sequence Matters: Anabolics First?</b><br><i>Robert A. Wermers, M.D.</i>                                   |
| 8:30am  | <b>Cancer Therapy Induced Bone Loss</b><br><i>Jad Sfeir, M.D., M.S.</i>                                       |
| 9:00am  | <b>Bone Clinical Pathological Conference</b><br><i>Kurt A. Kennel, M.D.</i><br><i>Robert A. Wermers, M.D.</i> |
| 10:00am   | Refreshment Break   |
| <b>Thyroid</b>                                      |   |
| Moderator: <i>Kalpana Muthusamy, M.B.B.S., M.D.</i> |   |
| 10:20am   | <b>Micro PTC</b><br><i>Juan P. Brito Campana, M.B.B.S.</i>  |
| 10:50am   | <b>Updates on the Management of Grave's Hyperthyroidism</b><br><i>Marius N. Stan, M.D.</i>                    |
| 11:20am   | <b>Thyroid Function Testing: Challenges and Pitfalls</b><br><i>Diana S. Dean, M.D.</i>                        |
| 11:50am   | <b>Management of Thyroid Eye Disease</b><br><i>Marius N. Stan, M.D.</i>                                       |
| 12:20pm   | Closing Remarks   |
| 12.30pm   | Adjourn   |



# Request for Taxpayer Identification Number and Certification

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

▶ Go to [www.irs.gov/FormW9](http://www.irs.gov/FormW9) for instructions and the latest information.

Print or type. See Specific Instructions on page 3.

1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.  
**Mayo Clinic**

2 Business name/disregarded entity name, if different from above

3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only **one** of the following seven boxes.

Individual/sole proprietor or single-member LLC     C Corporation     S Corporation     Partnership     Trust/estate

Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ▶ \_\_\_\_\_

**Note:** Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is **not** disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.

Other (see instructions) ▶ **501 (c)(3) tax-exempt non-profit organization**

4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):  
Exempt payee code (if any) 1  
Exemption from FATCA reporting code (if any) A  
(Applies to accounts maintained outside the U.S.)

5 Address (number, street, and apt. or suite no.) See instructions.  
**200 First Street Sw**

6 City, state, and ZIP code  
**Rochester, MN 55905**

7 List account number(s) here (optional)

Requester's name and address (optional)

## Part I Taxpayer Identification Number (TIN)

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

**Note:** If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

**Social security number**

|  |  |  |   |  |  |  |  |  |  |
|--|--|--|---|--|--|--|--|--|--|
|  |  |  | - |  |  |  |  |  |  |
|--|--|--|---|--|--|--|--|--|--|

or

**Employer identification number**

|   |   |   |   |   |   |   |   |   |   |
|---|---|---|---|---|---|---|---|---|---|
| 4 | 1 | - | 6 | 0 | 1 | 1 | 7 | 0 | 2 |
|---|---|---|---|---|---|---|---|---|---|

## Part II Certification

Under penalties of perjury, I certify that:

- The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
- I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
- I am a U.S. citizen or other U.S. person (defined below); and
- The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

**Certification instructions.** You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

**Sign Here**    Signature of U.S. person ▶ *Kelly M. Huneke*    Date ▶ 1/2/2024

## 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](http://www.irs.gov/FormW9).

### Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS 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-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), 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.

*If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.*