



Exhibitor & Sponsorship Prospectus

Mayo Clinic Urology Review 2026
Fairmont Orchid, Hawaii
February 9, 2026 to February 13, 2026

Welcome

On behalf of the course directors Katie T. Anderson, M.D., Igor Frank, M.D., and Boyd R. Viers, M.D., and Mayo Clinic School of Continuous Professional Development, we are pleased to announce the upcoming Mayo Clinic Urology Review 2026 course being held at the Fairmont Orchid, Kamuela, Hawaii.

This course provides urologists with a comprehensive update on the field of clinical urology. Our physicians are leaders in clinical research and in developing novel therapies that enhance our capability to offer the most advanced treatments of various urologic conditions. This course will provide a comprehensive overview of the diagnosis and management of many urologic diseases that have been dramatically influenced by recent medical, surgical and technical advances.

Please visit the course website at ce.mayo.edu/urology2026 for additional details on the course. The Mayo Clinic Urology Review 2026 will be held at the Fairmont Orchid. Guest rooms have been reserved at a discounted rate over the course dates. Room reservations must be made before January 8, 2026, or before the room block fills, whichever occurs first.

Fairmont Orchid

One North Kaniku Drive
Kamuela, HI 96743
United States

If you are interested in participating in this course, please complete the electronic Letter of Agreement Form. If you have not already done so, please [create an account](#) prior to signing our letter of agreement.

Mayo Clinic recognizes these types of educational programs would not be possible without your support. We have a variety of sponsorship opportunities for you to consider. If you do not see what you are looking for, contact us and we will be happy to discuss additional advertising opportunities.

Thank you for your consideration!

Mayo Clinic Urology Review 2026

Overview:

This course offers a quality selection of marketing and advertising opportunities. These are designed to help companies further engage, network and connect with attendees during the annual conference. Mayo Clinic staff can help maximize exposure through additional advertising opportunities.

Why Sponsor:

Technical and educational exhibits provide a professional and educational environment in which physicians 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 and the management of the medical/surgical practice. Additionally, the exhibits enhance the educational content of the meeting, helping to provide quality continuing medical education.

Benefits of Sponsorship:

- Interact face-to-face with numerous medical professionals
 - 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
- Sponsorships opportunities

Sponsorship & Exhibit Opportunities

Platinum Level - \$20,000.00

- Limited to 2 companies
- Premium exhibit location in foyer
- Two 6-foot exhibit tables
- Recognition in conference syllabus, signage, break slides & announcement from podium
- Attendee list (Opt-in only – name, city, and state)
- Access to networking opportunities throughout the course
- Virtual Booth

Gold Level - \$15,000.00

- Limited to 4 companies
- Premium exhibit location in foyer
- One 6-foot exhibit table
- Recognition in conference syllabus, signage, break slides & announcement from podium
- Attendee list (Opt-in only – name, city, and state)
- Access to networking opportunities throughout the course

Silver Level - \$6,000.00

- One 6-foot exhibit table in exhibit hall
- Recognition in conference syllabus, signage, break slides & announcement from podium.
- Attendee list (Opt-in only – name, city, and state)
- Access to networking opportunities throughout the course

Product Theatre - \$30,000.00

Showcase your product offerings to attendees with a product theatre.

- 45-minute breakfast or lunch session with complimentary meeting room space. Food and beverage will be provided by Mayo Clinic. Attendee list after the event, networking opportunities, and acknowledgment and recognition at the conference
- Sponsor is responsible for providing speaker(s), program invitations and advertisements for the product theatre.
- Sponsor is logistically and financially responsible for any/all audiovisual needs for the product theatre.

Product Theatre +2 - \$20,000.00

- This second product theatre may be purchased only if the first product theatre is purchased and Mayo approved.
- Date/time of second product theatre is subject to availability.

Internet - \$15,000.00 (Exclusive)

Help attendees stay connected with their office and home while away at the conference. Sponsor wireless internet access in the meeting space for the course attendees.

- Supporter will be recognized throughout the meeting in signage and electronic communications.
- Company name will be displayed outside the meeting space.

Attendee Bags - \$7,500.00 (Exclusive)

Prominently display your company name on attendee bags. Sponsor is responsible for sourcing the bags and providing to the CME staff to distribute to attendees once onsite at the course.

- Supporter will be recognized throughout the meeting in signage and electronic communications.
- Company name will be displayed outside the meeting space.

[Click here to secure your Exhibit/Sponsorship](#)

A signed letter of agreement is required to secure your Exhibit/Sponsorship. This is a competitive course. Please consider signing our agreement early to secure Exhibit/Sponsorship.

Set-up: Sunday, February 8th – Time 2:00pm – 4:00pm

Exhibit Hours - Monday, February 9th at 6:00 am to Friday, February 13th at 12:00 pm

Tear Down: Friday, February 13th – at conclusion of course

Payment Options:

PREFERRED Payment: Credit card

To pay by credit card, please click [here](#)

By Check: Make checks payable to:

Mayo Clinic - MCSCPD

200 First St SW

Plummer 2-60, Attn: Morgan Gish

Rochester, MN 55905

Reference: Urology Review 5326R01808 on check

Mayo Clinic Tax ID: 41-6011702



Mayo Clinic
Urology Review
February 9-13, 2026

-All times listed in **HAWAIIAN** time zone.

| Monday, February 9, 2026 | |
|--------------------------|---|
| 6:00 a.m. | Registration / Breakfast and Exhibitors |
| 6:15 – 7:00 a.m. | Industry Satellite Symposium Breakfast |
| 6:50 a.m. | Welcome and Conference Overview Course Directors |
| 7:00 – 9:15 a.m. | Prostate – Malignant I Moderator: Matthew Tollefson, M.D. |
| 7:00 a.m. | Active Surveillance in 2026: One Size Fits All or Can We Individualize? Paras Shah, M.D. |
| 7:15 a.m. | Tips and Tricks of Transperineal Fusion Biopsy Derek Lomas, M.D. |
| 7:30 a.m. | Focal Therapy for Prostate Cancer: Which patients and Which Technique? Daniel Frendl, M.D., Ph.D. |
| 7:45 a.m. | Prostate Cancer Radiation in 2026: Hormone Therapy, Hypofractionation and Modality Brad Stish, M.D. |
| 8:00 a.m. | Robotic Prostatectomy: My Technique, Tips and Tricks, Lessons Learned Matthew Gettman, M.D. |
| 8:15 a.m. | What is Robotic Prostatectomy Going to Look Like in the Future? Matthew Tollefson, M.D. |
| 8:30 a.m. | Reducing the Morbidity of Robotic Prostatectomy Igor Frank, M.D. |
| 8:45 a.m. | Panel Discussion Moderator: Matthew Tollefson, M.D. Panelists: All Prostate – Malignant I Presenters |
| 9:15 a.m. | Break and Exhibitors |
| 9:45 a.m. – Noon | Men's Health Moderator: Sevann Helo, M.D. |
| 9:45 a.m. | Evidence for Post-prostatectomy Rehabilitation – Setting Patients Up for Success Sevann Helo, M.D. |
| 10:00 a.m. | Penile Implant Surgery – Complications & Challenging Cases Tobias Kohler, M.D., M.P.H. |
| 10:15 a.m. | Latest on Testosterone Supplementation Rachel Rubin, M.D. – Georgetown University |
| 10:30 a.m. | Managing post-operative Pain in Penile Surgery Jay Simhan, M.D. – Fox Chase Cancer Center |
| 10:45 a.m. | Perioperative Considerations and Limitations of GLP-1 Agonists for the Urologist Anna Ward, M.D. |
| 11:00 a.m. | Erectile Dysfunction: How to Counsel Patients About Lifestyle Modifications and Diet Nahid Punjani, M.D., M.P.H. |



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| Continuing Monday, February 9, 2026 | |
|-------------------------------------|---|
| 11:15 a.m. | Debate: Peyronies Disease – Which Approach Maximizes Patient Satisfaction? Surgical Management - Matthew Ziegelmann, M.D. Non-surgical Management - Nahid Punjani, M.D., M.P.H. |
| 11:35 a.m. – Noon | Panel Discussion Moderator: Sevann Helo, M.D. Panelists: All Men's Health Presenters |
| Noon | Adjourn Day |

| Tuesday, February 10, 2026 | |
|----------------------------|--|
| 6:00 a.m. | Registration / Breakfast and Exhibitors |
| 6:15 – 7:00 a.m. | Industry Satellite Symposium Breakfast |
| 6:55 a.m. | Welcome Back Announcements Course Directors |
| 7:00 – 9:15 a.m. | Female Urology Moderator: Brian Linder, M.D. |
| 7:00 a.m. | Updates on Overactive Bladder Care Brian Linder, M.D. |
| 7:15 a.m. | Anterior Vaginal Wall Mass – Diagnosis & Management Rachel Rubin, M.D. – Georgetown University |
| 7:30 a.m. | Approach to Female Sexual Dysfunction and Dyspareunia Rachel Rubin, M.D. – Georgetown University |
| 7:45 a.m. | Recurrent Urinary Tract Infections: Fact or Fiction? Melissa Kaufman, M.D., Ph.D., FACS - Vanderbilt University |
| 8:00 a.m. | What's New in the Management of Female Stress Incontinence Annetta Madsen, M.D. |
| 8:15 a.m. | Interstitial Cystitis/Bladder Pain Syndrome: Tips and Tricks Aqsa Khan, M.D. |
| 8:30 a.m. | Genitourinary Syndrome of Menopause Guideline Discussion Melissa Kaufman, M.D., Ph.D., FACS - Vanderbilt University Rachel Rubin, M.D. - Georgetown University |
| 9:00 a.m. | Panel Discussion Moderator: Brian Linder, M.D. Panelists: All Female Urology Presenters |
| 9:15 a.m. | Break and Exhibitors |
| 9:45 a.m. – noon | Bladder - Malignant Moderators: Stephen Boorjian, M.D. and Paras Shah, M.D. |
| 9:45 a.m. | Technique Matters: Blue Light, en bloc, and how to do the best TURBT in 2026 Mark Tyson II, M.D., M.P.H. |



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| Continuing Tuesday, February 10, 2026 | |
|---------------------------------------|---|
| 10:00 a.m. | Current and Future Options for the Management of High-Risk Non-Muscle Invasive Bladder Cancer Timothy Lyon, M.D. |
| 10:15 a.m. | Updates on BCG Unresponsive Disease: What's Available and How to Select? Stephen Boorjian, M.D. |
| 10:30 a.m. | NMIBC Panel Discussion Moderator: Stephen Boorjian, M.D. Panelists: Mark Tyson II, M.D., M.P.H., Timothy Lyon, M.D., and Paras Shah, MD |
| 10:45 a.m. | Surgical Technique Matters: Components of an Oncologically Sound Radical Cystectomy Seth Lerner, M.D. – Baylor College of Medicine |
| 11:00 a.m. | Tips and Tricks of Robotic Cystectomy Matthew Tollefson, M.D. |
| 11:15 a.m. | Trimodal Therapy for Muscle Invasive Bladder Cancer: Patient Selection and Contemporary Outcomes Ryan Phillips, M.D., Ph.D. |
| 11:30 a.m. | Neoadjuvant and Adjuvant Systemic Therapy for Newly Diagnosed Muscle Invasive Bladder Cancer Jacob Orme, MD |
| 11:45 a.m. – noon | MIBC Panel Discussion Moderator: Paras Shah, M.D. Panelists: Ryan Phillips, M.D., Ph.D. Jacob Orme, M.D., Ph.D., Matthew Tollefson, Seth Lerner |
| Noon | Adjourn Day |

| Wednesday, February 11, 2026 | |
|------------------------------|---|
| 6:00 a.m. | Registration / Breakfast and Exhibitors |
| 6:15 – 7:00 a.m. | Industry Satellite Symposium Breakfast |
| 6:55 a.m. | Welcome Back Announcements Course Directors |
| 7:00 – 9:15 a.m. | Prostate – Malignant II Moderator: R. Jeffrey Karnes M.D. |
| 7:00 a.m. | TBD Alberto Briganti, M.D. – Vita-Salute University San Raffaele, Milan Italy |
| 7:15 a.m. | Treatment of Localized High Risk Prostate Cancer and the Role of Lymphadenectomy Alberto Briganti, M.D. – Vita-Salute University San Raffaele, Milan Italy |
| 7:30 a.m. | What the Urologist Should Know About Current Sequencing of Advanced Prostate Cancer Management Jacob Orme, M.D., Ph.D. |



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| Continuing Wednesday, February 11, 2026 | |
|---|--|
| 7:45 a.m. | Salvage XRT After Prostatectomy Brian Davis, M.D. |
| 8:00 a.m. | Management of Biochemical Recurrence After Definitive Therapy Eugene Kwon, M.D. |
| 8:15 a.m. | Is There a Role for Metastasis Directed Therapy R. Jeffrey Karnes, M.D. |
| 8:30 a.m. | Panel Discussion Moderator: R. Jeffrey Karnes, M.D. Panelists: All Prostate – Malignant II Presenters |
| 9:15 a.m. | Break and Exhibitors |
| 9:45 a.m. – noon | Benign Prostate Moderators: J. Nick Warner, M.D. |
| 9:45 a.m. | Sacral Neuromodulation in Males with Overactive Bladder & Retention Meghan Cooper, DO |
| 10:00 – 10:45 a.m. | Small Gland Session Prostatitis & Rezum Tobias Kohler, M.D., M.P.H. Managing the Small, Radiated Prostate Bridget Findlay, M.D. Limiting Side Effects of TURP in Small Prostates J. Nick Warner, M.D. |
| 10:45 – 11:30 a.m. | Large Gland Debate Moderator: Kevin Wymer, M.D. Aquablation Meghan Cooper, DO HoLEP Mitchell Humphreys, M.D. Prostatic Artery Embolization Scott Thompson, M.D., Ph.D. Robotic Simple Prostatectomy Paras Shah, M.D. |
| 11:30 a.m. – noon | Panel Discussion Moderator: J. Nick Warner, M.D. Panelists: All Benign Prostate Presenters |
| Noon | Adjourn Day |



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| Thursday, February 12, 2026 | |
|-----------------------------|--|
| 6:00 a.m. | Registration / Breakfast and Exhibitors |
| 6:15 – 7:00 a.m. | Industry Satellite Symposium Breakfast |
| 6:55 a.m. | Welcome Back Announcements Course Directors |
| 7:00 – 9:15 a.m. | Trauma and Reconstruction Moderator: Katherine Anderson, M.D. |
| 7:00 a.m. | Pediatric Emergencies for the Adult Urologist Candace Granberg, M.D. |
| 7:15 a.m. | Managing the Overactive Neurogenic Bladder Katherine Anderson, M.D. |
| 7:30 a.m. | Genitourinary Trauma: What Every Urologist Should Know Boyd Viers, M.D. |
| 7:45 a.m. | Management of Severe Urgency and Stress Incontinence Following Radiation Therapy Melissa Kaufman, M.D., Ph.D., FACS – Vanderbilt University |
| 8:00 a.m. | Approach to the Radiated Bladder Neck & Posterior Urethral Strictures Jay Simhan, M.D., FACS – Fox Chase Cancer Center |
| 8:15 – 8:45 a.m. | Debate: Male Incontinence Moderator: Boyd Viers, M.D. Artificial Urinary Sphincter Melissa Kaufmann, M.D., Ph.D., FACS Urethral Sling J. Nick Warner, M.D. Adjustable Continence Therapy Katherine Anderson, M.D. |
| 9:00 a.m. | Panel Discussion Moderator: Katherine Anderson, M.D. Panelists: All Trauma and Reconstruction Presenters |
| 9:15 a.m. | Break and Exhibitors |
| 9:45 a.m. – noon | Kidney - Malignant Moderator: Bradley Leibovich, M.D. |
| 9:45 a.m. | Renal Mass Basics: Epidemiology, Histology, Biologic Potential, Evaluation, and an Overview of Treatment Options Bradley Leibovich, M.D. |
| 9:55 a.m. | Tumor and Patient Characteristics that make Ideal Percutaneous Ablation Case Grant Schmit, M.D. |
| 10:10 a.m. | Myths and Realities of Radiotherapy for Renal Masses Brad Stish, M.D. |
| 10:25 a.m. | Robotic Partial Nephrectomy: Case Selection, Tips and Tricks, and New Surgical Techniques Abhinav Khanna, M.D., M.P.H. |



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| Continuing Thursday, February 12, 2026 | |
|--|---|
| 10:45 a.m. | Evolution of Management of Upper Tract Urothelial Carcinoma or Speakers Choice of UTUC talk Seth Lerner, M.D. – Baylor College of Medicine |
| 10:55 a.m. | Robotic Radical Nephrectomy and Nephroureterectomy, Case Selection and Tips and Tricks for Best Outcomes Aaron Potretzke, M.D. |
| 11:15 | Adjuvant and Neoadjuvant Therapy for RCC Brian Costello, MD |
| 11:30 a.m. – noon | Panel Discussion Moderator: Bradley Leibovich, M.D. Panelists: All Kidney – Malignant Presenters |
| Noon | Adjourn Day |
| 7:00 – 10:00 p.m. | Farewell Banquet |

| Friday, February 13, 2026 | |
|---------------------------|--|
| 6:00 a.m. | Registration / Breakfast and Exhibitors |
| 6:15 – 7:00 a.m. | Industry Satellite Symposium Breakfast |
| 6:55 a.m. | Welcome Back Announcements Course Directors |
| 7:00 – 9:15 a.m. | Urolithiasis Moderator: Aaron Potretzke, M.D. |
| 7:00 a.m. | Since the Stone Age – History of Surgical Stone Treatment Kevin Koo, M.D., M.P.H. |
| 7:15 a.m. | Is There Still a Role for Medical Stone Management? Jodi Antonelli, M.D. - Duke University |
| 7:30 a.m. | Updates in Ureteroscopic Treatment of Stones Karen Stern, M.D. |
| 7:45 a.m. | Latest in Percutaneous Stone Treatments Kevin Wymer, M.D. |
| 8:00 a.m. | From SWL to Acoustic Tweezers: The Status of Sound Waves in Stone Management Dane Klett, M.D. |
| 8:15 a.m. | Debate 1: A 1.5cm Lower Pole Stone – Ureteroscopy vs PCNL Moderator: Aaron Potretzke, M.D. Speakers: Dane Klett, M.D. and Karen Stern, M.D. |
| 8:35 a.m. | Debate Asymptomatic stones – To Treat or Not to Treat? Moderator: Aaron Potretzke, M.D. Speakers: Kevin Koo, M.D., M.P.H. and Jodi Antonelli, M.D. - Duke University |



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| Continuing Friday, February 13, 2026 | |
|--------------------------------------|---|
| 9:55 a.m. | Panel Discussion Moderator: Aaron Potretzke, M.D. Panelists: All Urolithiasis Presenters |
| 9:15 a.m. | Break and Exhibitors |
| 9:45 a.m. – noon | The Future of Urology: Optimizing Your Practice and Sustaining Your Career Moderator: Kevin Koo M.D., M.P.H. |
| 9:45 a.m. | Private Equity in Urology Michael Darson, M.D. - LSU Health New Orleans |
| 10:05 a.m. | The Future of AI in Urology Abhinav Khanna, M.D., M.P.H. |
| 10:20 a.m. | Surgical Ergonomics and Surgeon Wellness Raymond Pak, M.D., M.B.A. |
| 10:35 a.m. | Bringing the OR to the Clinic Matthew Ziegelmann, M.D. |
| 10:45 a.m. | Maximizing Collaboration with Advanced Practice Providers Tobias Kohler, M.D., M.P.H., FACS |
| 10:55 a.m. | Future of the Workforce: Threats and Opportunities Kevin Koo M.D., M.P.H. |
| 11:10 a.m. | Legislative and Regulatory Challenges in Urology Candace Granberg, M.D. |
| 11:20 a.m. | Resident Essay Contest Winner TBD |
| 11:30 – Noon | Practice Management Roundtable Moderator: Kevin Koo M.D., M.P.H. Panelists: All The Future of Urology: Optimizing Your Practice and Sustaining Your Career Presenters |
| Noon | Adjourn Day |

PHARMACOLOGY CONTENT

Some presentations will contain pharmacology content. It is the responsibility of the individual learner to determine the amount of pharmacology content.

**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.) Mayo Clinic | |
| | 2 Business name/disregarded entity name, if different from above. | |
| | 3a Check the appropriate box for federal tax classification of the entity/individual whose name is entered on line 1. Check only one of the following seven boxes. <input type="checkbox"/> Individual/sole proprietor <input type="checkbox"/> C corporation <input type="checkbox"/> S corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate <input type="checkbox"/> LLC. Enter the tax classification (C = C corporation, S = S corporation, P = Partnership) _____ Note: Check the "LLC" box above and, in the entry space, enter the appropriate code (C, S, or P) for the tax classification of the LLC, unless it is a disregarded entity. A disregarded entity should instead check the appropriate box for the tax classification of its owner. <input checked="" type="checkbox"/> Other (see instructions) 501 (c) (3) Tax-exempt Nonprofit Corporation | 4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3): Exempt payee code (if any) 1 Exemption from Foreign Account Tax Compliance Act (FATCA) reporting code (if any) A (Applies to accounts maintained outside the United States.) |
| | 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. 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. See also *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 <i>Katy Domaille</i> | Date <i>01/02/2025</i> |
|------------------|---|----------------------------------|

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