



City of Clearwater
Procurement

Jay Ravins, Department Director
100 South Myrtle Avenue, Clearwater, FL 33756

[INSTIGO] RESPONSE DOCUMENT REPORT

RFP No. 54-25

Sponsorship and Naming Rights Services

RESPONSE DEADLINE: September 9, 2025 at 10:00 am

Report Generated: Tuesday, September 9, 2025

Instigo Response

CONTACT INFORMATION

Company:

Instigo

Email:

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Contact:

Samson Oni

Address:

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Phone:

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Website:

www.instigoagency.com

Submission Date:

Sep 9, 2025 9:58 AM (Eastern Time)

ADDENDA CONFIRMATION

No addenda issued

QUESTIONNAIRE

1. Exceptions*

Proposers shall indicate any and all exceptions taken to the provisions or specifications in this solicitation document. Exceptions that surface elsewhere and that do not also appear under this section shall be considered invalid and void and of no contractual significance.

Do you have any exceptions to the provisions or specifications?

No

2. Additional Materials*

Have you included any additional materials?

No

3. Certified Business*

Are you a Certified Small Business or a Certified Minority, Woman or Disadvantaged Business Enterprise?

Yes

CERTIFIED BUSINESS TYPE*

Pick one of the following.

Certified Minority, Woman, or Disadvantaged Business Enterprise

CERTIFYING AGENCY*

List the Agency that provided your certification.

Florida

CERTIFICATION DOCUMENTATION*

Provide a copy of your certification.

Minority-Owned_Certification_08-29-2024_to_08-29-2026.pdf

4. Vendor Certification*

By submitting this response, the Vendor hereby certifies that:

- A. It is under no legal prohibition on contracting with the City of Clearwater.
- B. It has read, understands, and is in compliance with the specifications, terms and conditions stated herein, as well as its attachments, and any referenced documents.
- C. It has no known, undisclosed conflicts of interest.
- D. The prices offered were independently developed without consultation or collusion with any of the other vendors or potential vendors or any other anti-competitive practices.
- E. No offer of gifts, payments or other consideration were made to any City employee, officer, elected official, or consultant who has or may have had a role in the procurement process for the commodities or services covered by this contract. The Vendor has not influenced or attempted to influence any City employee, officer, elected official, or consultant in connection with the award of this contract.
- F. It understands the City may copy all parts of this response, including without limitation any documents or materials copyrighted by the Vendor, for internal use in evaluating respondent's offer, or in response to a public records request under Florida's public records law (F.S. Chapter 119) or other applicable law, subpoena, or other judicial process; provided that the City agrees not to change or delete any copyright or proprietary notices.

- G. It hereby warrants to the City that the Vendor and its subcontractors will comply with, and are contractually obligated to comply with, all federal, state, and local laws, rules, regulations, and executive orders.
- H. It certifies that Vendor is not presently debarred, suspended, proposed for debarment, declared ineligible, voluntarily excluded, or disqualified from participation in this matter from any federal, state, or local agency.
- I. It will provide the commodities or services specified in compliance with all federal, state, and local laws, rules, regulations, and executive orders if awarded by the City.
- J. It is current in all obligations due to the City.
- K. It will accept all terms and conditions as set forth in this solicitation if awarded by the City.
- L. The signatory is an officer or duly authorized representative of the Vendor with full power and authority to submit binding offers and enter into contracts for the commodities or services as specified herein.

Confirmed

5. E-Verify System Certification*

PER FLORIDA STATUTE 448.095, CONTRACTORS AND SUBCONTRACTORS MUST REGISTER WITH AND USE THE E-VERIFY SYSTEM TO VERIFY THE WORK AUTHORIZATION STATUS OF ALL NEWLY HIRED EMPLOYEES.

The affiant, by virtue of confirming below, certifies that:

- A. The Contractor and its Subcontractors are aware of the requirements of Florida Statute 448.095.
- B. The Contractor and its Subcontractors are registered with and using the E-Verify system to verify the work authorization status of newly hired employees.
- C. The Contractor will not enter into a contract with any Subcontractor unless each party to the contract registers with and uses the E-Verify system.
- D. The Subcontractor will provide the Contractor with an affidavit stating that the Subcontractor does not employ, contract with, or subcontract with unauthorized alien.
- E. The Contractor must maintain a copy of such affidavit.

- F. The City may terminate this Contract on the good faith belief that the Contractor or its Subcontractors knowingly violated Florida Statutes 448.09(1) or 448.095(2)(c).
- G. If this Contract is terminated pursuant to Florida Statute 448.095(2)(c), the Contractor may not be awarded a public contract for at least 1 year after the date on which this Contract was terminated.
- H. The Contractor is liable for any additional cost incurred by the City as a result of the termination of this Contract.

Confirmed

6. Vendor's Proposal*

Upload a copy of your proposal with the information requested as detailed in the solicitation titled 54-25 Sponsorship and Naming Rights Services.

RFP_54-25_Sponsorship_and_Naming_Rights_Services.pdf

7. Scrutinized Company Certification*

Please download the below documents, complete, notarize, and upload.

- [SCRUTINIZED COMPANIES AND B...](#)

SCRUTINIZED_COMPANIES_AND_BUSINESS_OPERATIONS_CERTIFICATION.pdf

8. Compliance with Anti-Human Trafficking Laws*

Please download the below documents, complete, and upload.

- [Compliance with 787.06 form...](#)

Compliance_with_787.06_form_.pdf

9. W-9*

Upload your current W-9 form. (available at <https://www.irs.gov/pub/irs-pdf/fw9.pdf>)

Instigo_LL_C_W9_Form.pdf

State of Florida

Minority Business Certification

Instigo, LLC

Is certified under the provisions of
287 and 295.187, Florida Statutes, for a period from:

08/29/2024 to 08/29/2026



Pedro Allende
Florida Department of Management Services



PROPOSAL
2025

instigo

Created by:
SAMSON ONI - INSTIGO AGENCY
CEO

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Submitted electronically to:

City of Clearwater, Florida
Procurement Division through
through the City's e-Procurement Portal

RFP 54-25 Sponsorship and Naming Rights Services

Proprietary Information

In compliance with Chapter 119 of the Florida Statutes (Public Record Law), we understand that all documents submitted in response to the Request for Proposal (RFP) are considered public records. However, Instigo identifies certain information within our proposal as confidential and proprietary, which we believe is exempt from public disclosure under Florida law.

Specifically, any information marked as "Confidential" pertains to trade secrets, proprietary business methodologies, sensitive financial information, and client lists that, if disclosed, could provide a competitive advantage to other parties. These sections are clearly identified and cited with the applicable exempting law under Section 815.045 of the Florida Statutes (Trade Secret Information). We request that these confidential sections be treated accordingly to maintain their exempt status under the relevant provisions.

September 9, 2025

City of Clearwater

Re: Request for Proposal 54-25, Sponsorship and Naming Rights Services

Dear Members of the Evaluation Committee,

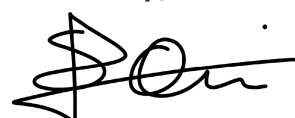
Instigo is thrilled to submit this proposal for the City of Clearwater's Sponsorship and Naming Rights Services. We believe the City is at a pivotal and exciting moment. Following the historic redevelopment of the downtown waterfront through the Imagine Clearwater project, the City has already achieved significant success by securing premier foundational partners, including BayCare Health System as the naming rights partner for The Sound and Floridacentral Credit Union for the venue's VIP area. These agreements have set the stage for the next, more comprehensive phase of this initiative, and we would be excited to partner with you to help you build upon that success.

We understand the City's objective is not merely to sell sponsorships, but to generate significant and sustainable new revenue that supports and enhances the world-class community assets that make Clearwater a premier destination to live and visit. Instigo offers a distinct blend of national-level strategic experience, honed with globally recognized brands like the NBA and PBR, combined with the invaluable on-the-ground expertise of a firm rooted in the Central Florida market. Our lead consultant, Samson Oni, has direct experience developing the sponsorship pipeline for Orlando City Soccer, providing us with an unmatched understanding of the regional corporate landscape and a network of local relationships.

Our detailed approach, outlined within, moves beyond transactional sales to curate authentic, story-driven partnerships. We specialize in creating innovative platforms that deliver measurable results for the City and tangible value for its partners, ensuring a sustainable and thriving program for years to come.

We are incredibly excited by the opportunity to partner with the City of Clearwater to build a sponsorship program that will become a model for municipalities across the country. Thank you for your time and consideration.

Sincerely,

A handwritten signature in black ink, appearing to read "Samson Oni".

Samson Oni

Owner, Instigo Agency

T: (321) 421-5776

E: samson@instigoagency.com

W: www.instigoagency.com

Experience & Qualifications

Instigo is a specialized sponsorship management agency founded in 2020 to build powerful and authentic partnerships between brands and property rights-holders. Our mission is to move beyond transactional sponsorships to curate partnerships that generate sustainable revenue, build brand affinity, and empower the communities we serve. We focus on a **storytelling-first approach**, using business insight and creative packaging to achieve unparalleled results for our clients.

Our firm is an expert in the full lifecycle of sponsorship and naming rights development, including:

- Asset Identification, Inventory Analysis, and Valuation
- Strategic Program Development and Creative Packaging
- Targeted Prospecting, Solicitation, and Negotiation
- Sponsor Activation, Fulfillment, and Relationship Management

Municipal & Public Sector Experience

Instigo has extensive experience developing successful sponsorship programs for governmental clients, and we are intimately familiar with the unique operational needs and objectives of public-sector partnerships. Our most relevant engagement involved building a comprehensive sponsorship and naming rights program from the ground up for the City of Spearfish, SD. Faced with a newly constructed sportsplex that had minimal existing sponsorship, we were hired as the City's exclusive consultant to perform a complete asset audit, develop a new valuation and pricing structure, and lead all solicitation efforts. Within just eight months, our strategic approach generated over \$1 million in revenue for a city of only 12,000 residents, including securing a \$500,000 naming rights partner for the sportsplex. This project demonstrates our proven ability to deliver measurable results, regardless of market size.

Regional Expertise & Major Brand Experience

A key advantage Instigo brings to the City of Clearwater is our deep, authentic connection to the Central Florida market. Our principal consultant, Samson Oni, is based in the region and possesses an in-depth familiarity with its key businesses, stakeholders, and prospective sponsors. This local insight was honed during his time executing sponsorship prospecting and strategy for Orlando City Soccer Club. This experience provided a direct education in the regional sports and entertainment landscape, building an extensive network of corporate contacts and a nuanced understanding of which brands are most inclined to invest in community-based assets in Central Florida. This regional expertise is complemented by our experience selling high-value advertising and sponsorship packages for globally recognized sports properties, including the NBA's Cleveland Cavaliers and Professional Bull Riders (PBR).

History of Past Work Performance*

- **City of Spearfish, SD**
 - **Size of Entity Serviced:** City with a population of 12,000.
 - **Period of Agreement:** 2023/2024.
 - **Services Offered:** Complete sponsorship program development, including asset identification, valuation, packaging, solicitation, and agreement negotiation.
- **Professional Bull Riders (PBR)**
 - **Size of Entity Serviced:** Global sports organization.
 - **Period of Agreement:** 2021/2022/2025.
 - **Services Offered:** Strategy development, market analysis, and proposal development.
- **Orlando City Soccer (Central Florida Region)**
 - **Size of Entity Serviced:** Major league sports organization.
 - **Period of Agreement:** 2018/2019.
 - **Services Offered:** Sponsorship prospecting, strategy development, and market analysis.
- **Cleveland Cavaliers**
 - **Size of Entity Serviced:** Major league sports organization.
 - **Period of Agreement:** 2016 - 2018.
 - **Services Offered:** Sponsorship prospecting, strategy development, and market analysis.

Personnel with Primary Responsibility

Samson Oni will have the primary responsibility for the City of St. Cloud's contract. Samson will oversee all aspects of the project, from initial asset identification and valuation to the negotiation and finalization of sponsorship agreements.

- **Samson Oni, Principal Consultant**
 - **Function:** Project Lead; responsible for overall strategy, sponsorship sales, and client management.
 - **Experience:** 10+ years in sponsorship strategy and sales, with a focus on sports sponsorship, event sponsorship, and public-sector.
 - **Education:** Postgraduate degree in Business Administration.

Business Licenses and Permits

Instigo is fully licensed, permitted, and certified to conduct business in the State of Florida. We hold all necessary federal, state, and local licenses required for the provision of our services including a Certified Business Enterprise (CBE) certification and a Minority Owned certification.

Organization Information

Legal Name: Instigo, LLC

DBA: Instigo Agency

Location and Type of Business: Florida Limited Liability Company

FEIN: 85-0784313

key Personnel and Main Point of Contact: Samson Oni

Mailing Address: 7901 4th St. N, STE 300, St. Petersburg, FL 33702

Instigo was officially incorporated in 2020 as a sponsorship management agency. We help build partnerships between brands and property rights-holders.

Our mission is to tip the scales of success in the favor of the clients we serve by using business insight, packaging & activation strategy, and storytelling to achieve unparalleled sponsorship results.

We serve clients that are competing for sponsorship success in various industry sectors, including sports, entertainment, government, transit, art, and business events.



We've helped to secure over **\$30 million** in annual sponsorship revenue combined for property rights-holders.



We've helped to sell sponsorship opportunities to over **100 brands** including national brands like Audi, McDonald's, Pepsi, Disney, Anheuser-Busch, Toyota, Diageo, Lexus, Papa John's, Gatorade, and more.



We've managed the servicing and execution of contractual sponsor benefits for multiple brands, valued at over **\$4 million in benefits.**



We consistently hit our most important prospecting KPIs, which include maintaining a lifetime conversion rate of approximately **25% of leads** turned into either discovery meetings, 2-way conversations, proposal review, or negotiations.

Past Performance



Project: Spearfish Sportsplex Naming Rights, 2023/24

Client: City of Spearfish

Brand: Keating Resources

Summary

Between 2021 and 2023, the City of Spearfish struggled to attract sponsors for its under-construction 40-acre sportsplex, securing only \$7,500 from a single sponsor. With the property set to be completed in the summer of 2024, the City offered naming rights opportunities for its softball and soccer fields along with naming rights for the entire sportsplex. Faced with minimal success, the Mayor and Parks & Recreation department decided to hire Samson Oni from Instigo as their exclusive sponsorship consultant after a thorough RFP and bid process.

As the City's exclusive sponsorship consultant, our first task was to perform an asset audit and a valuation exercise for the naming rights of the sportsplex and other sponsorship assets, such as field naming rights. The challenge was to convince local and national businesses that investing in a community sportsplex in a relatively small city of 12,000 people would provide a unique opportunity with a high return on investment (ROI).

We set out to increase the value of the sponsorship program by creating unrealized inventory and developing comprehensive packages that extended beyond mere brand awareness and exposure. The next step was to craft and distribute a compelling story that aligned with business objectives through digital, social, collateral, and personal connections. Anticipating pricing objections due to the small market size, we developed new pricing structures that better served both the property rights holder and the potential naming rights partners.

Results

Our immediate swing into action and strategic approach led to significant success within a short timeframe:

- Within three months of outreach and market engagement, we secured six-figure deals for the City of Spearfish.
- Through savvy negotiation, each sponsorship deal generated an average of 150% more revenue than the City had originally anticipated.
- Within four months of sponsor prospecting, we secured a \$500,000 naming rights partner for the sportsplex from Keating Resources, a national realty and land developer.

This case study highlights how a strategic and creative approach to sponsorship sales can transform challenges into substantial revenue opportunities, even within a small market like Spearfish, SD.



Project: Sponsorship Sales Strategy, 2021/22

Client: Professional Bull Riders (PBR)

Brand: Camping World

Summary

In 2019, Professional Bull Riders (PBR) secured a media rights deal with CBS, paving the way for continued growth. The organization aimed to expand its reach through a multi-circuit structure, encompassing both domestic and international competitions. To support this expansion, PBR sought to attract a naming rights sponsor for its new PBR Teams circuit, set to debut in July 2022. However, PBR faced stiff competition from established major leagues such as the NFL, NBA, MLB, and NHL.

PBR's Chief Revenue Officer, Josh Baker, needed to develop a compelling sponsorship sales strategy that could successfully compete against these prominent sports leagues. The goal was to create an attractive proposition for potential sponsors, highlighting the growth potential and unique opportunities offered by the new PBR Teams circuit. Josh Baker enlisted the expertise of Samson Oni from Instigo to collaborate on crafting an effective sponsorship sales strategy. Samson focused on creating two impactful pitch decks:

1. Initial Engagement Pitch Deck: This deck was designed to capture the interest of potential sponsors by showcasing the growth potential of the new PBR Teams circuit.

2. Customized Pitch Deck: Once potential sponsors expressed interest and shared their business goals, a second, tailored pitch deck was developed. This deck integrated the specific business needs of the potential sponsors into PBR's sponsorship and naming rights offerings.

Results

The collaboration between PBR and Instigo led to a robust and effective sponsorship sales strategy, yielding several key outcomes:

- The entire sales team executed a clear and cohesive strategy, resulting in a more engaged and motivated team.
- The sales cycle for outreach activities was significantly shortened, reducing the time between initial prospect engagement and agreement execution.
- A wave of sponsorship deals was secured, including partnerships with Stillhouse vodka and Bass Pro Shops.
- Initially launched as PBR Teams, the new league successfully attracted a naming rights sponsor about a year later, securing a \$5 million/year deal with Camping World, a recreational vehicle dealer.

This strategic approach reinforced PBR's reputation as an innovative and forward-thinking sports organization capable of competing with traditional sports giants.



Project: Entrance Naming rights Entitlement, 2018/19

Client: Cleveland Cavaliers

Brand: Cleveland Cliffs

Summary

The Rocket Mortgage FieldHouse, home to the 2016 NBA Champions, the Cleveland Cavaliers, underwent a significant renovation in 2018. The 23-year-old venue received a much-needed facelift and expansion, particularly at its main North entrance, increasing the gathering space for attendees and pre-function events by over 300%. Following the extensive \$185 million renovation, the business department of the Cleveland Cavaliers sought to attract high sponsorship dollars for the naming rights of the newly renovated entrance.

The challenge was to capture the attention of target sponsor executives using non-traditional sales techniques. The objective was to create a compelling and innovative approach to demonstrate the value and potential of the new gathering space for sponsorship opportunities.

Samson Oni, as part of a small strategy task force, conceptualized a unique and creative sales strategy. The team decided to send target executives a replicate newspaper and a building blueprint that visualized a story about their brand being integrated into the new gathering place. This approach aimed to engage the executives' imagination and interest, leading them to see the potential of the sponsorship opportunity.

Results

The innovative sales approach led to several notable outcomes:

- It marked the introduction of the business department's first creative sales approach, moving away from traditional techniques.
- A high percentage of executives responded to the call-to-action, attending in-person presentations and experiences at the newly renovated venue.
- As a result, local company Cleveland Cliffs purchased the naming rights to the entrance for \$5 million over 10 years, making it the first such sponsorship deal for the major iron ore producer and supplier.

This strategic and creative approach demonstrated the effectiveness of innovative sales techniques in attracting high-value sponsors.

References

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Brooks Neil

Senior Director
New York Jets
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T: (201) 400-9733



Key Personnel



SAMSON ONI

Expertise in new business sales strategy, building compelling business cases, pitching, and constructing emotional buying triggers that align with the needs of sponsors.

I ensure any teams working under my management are as dedicated as I am in helping property rights-holders to sell the true value of their assets.

The City of Clearwater's contract will be managed directly by our owner and principal consultant, **Samson Oni**. He will serve as the dedicated **Lead Consultant** and the City's single point of contact, personally overseeing all aspects of the project from initial strategy development to the final negotiation of all major partnership agreements. This structure ensures the City receives the highest level of strategic oversight and client service.

- **Name:** Samson Oni
- **Role:** Lead Consultant
- **Function:** Responsible for overall project strategy, asset valuation, lead negotiation for all naming rights and top-tier sponsorships, and primary client relationship management with City of Clearwater staff and stakeholders.
- **Experience:** Mr. Oni has 20 years of specialized experience in sponsorship strategy and sales, with a proven track record of success in both the public and private sectors. His expertise includes building a municipal sponsorship program from the ground up for the City of Spearfish, developing sponsorship strategy for major league sports organizations like Orlando City Soccer (MLS) and the Cleveland Cavaliers (NBA), and securing high-value partnerships for global brands like Professional Bull Riders (PBR) and the English Premier League (EPL).
- **Education:** Postgraduate degree in Business Administration.

Staffing Availability and Workload

Instigo intentionally maintains a focused client portfolio to ensure that each partner, including the City of Clearwater, receives the dedicated attention and strategic focus required for success. We confirm that our firm possesses sufficient personnel and time resources to successfully perform the required services as outlined in this RFP. Our current and projected workload allows us to commence work immediately upon award of the contract.

Project Understanding and Proposed Approach

Our Understanding of the Opportunity

The City of Clearwater is at a pivotal and exciting moment. The completion of the transformative, \$84 million Imagine Clearwater redevelopment is a landmark achievement, and the City has already demonstrated significant success by securing a premier, long-term naming rights partner, BayCare Health System, for the park's anchor venue, The Sound.

Furthermore, the City has successfully layered a secondary partnership with Floridacentral Credit Union for the venue's VIP area. We understand these foundational agreements have set the stage for the next, more comprehensive phase of this initiative. The City's goal now is to engage a strategic partner to build upon this success and generate significant new revenue by marketing the rich portfolio of assets that remain across Coachman Park and the entire city.

This RFP is strategically built upon the "Subordinate Rights" clause established in the City's existing agreements, which provides a clear mandate to develop a multi-layered, ecosystem of corporate partners. Our role is to execute this mandate. We will curate partnerships that authentically reflect Clearwater's brand identity which is its pristine beaches, family-friendly values, and commitment to sustainability as outlined in the Clearwater Greenprint plan to attract partners who want to be part of the community's next chapter.

Our Phased Approach to Success: Our methodology is a comprehensive, six-phase process designed to build a professional, sustainable, and highly profitable sponsorship program from the ground up. This detailed approach ensures transparency for the City at every stage and is engineered to deliver measurable results.

Phase 1: Discovery & Strategic Valuation

The foundation of any successful program is a deep understanding of the assets. We will conduct a forensic analysis of the City's entire portfolio to uncover and quantify value.

- **Stakeholder Alignment:** We will conduct in-depth interviews with City leadership and Parks & Recreation staff to align on goals, priorities, and operational parameters.
- **Comprehensive Asset Audit:** We will perform on-site audits of all key facilities, including the unmonetized zones at Coachman Park (plaza, playground, splash pad), the six regional recreation centers, libraries, and the regional trail system.
- **Special Event Analysis:** We will perform a specific review of signature events like The Sea-Blues Festival, Clearwater Celebrates America, and the Turkey Trot to benchmark their current sponsorship performance and identify new, sellable inventory.
- **Deliverable:** An Asset Inventory & Valuation Report. This cornerstone document will assign a defensible market value to each major asset, benchmarked against the proven success of the existing BayCare and Floridacentral agreements, providing a clear roadmap of revenue potential.

Phase 2: Framework & Creative Packaging

With a clear understanding of the inventory, we will package these assets into compelling, market-ready partnership opportunities.

- **Strategic Architecture:** We will design a multi-tiered partnership framework (e.g., Naming Rights, Founding Partner, Presenting Partner, Community Partner) that allows for opportunities at various investment levels.
- **Bespoke Package Development:** We will create integrated, high-value proposals for premier assets and special events, bundling benefits like on-site activation, digital media, and hospitality into cohesive platforms that tell a story.
- **Deliverable:** A professional, master Partnership Opportunities Deck. This will serve as our primary sales tool, visually and narratively communicating the value of partnering with the City of Clearwater.

Phase 3: Targeted Solicitation & Marketing

Our approach is proactive and research-based, focusing on securing best-fit partners whose brand values align with the City's.

- **Prospect Identification:** We will build a qualified prospect database focused on premier, unclaimed categories (Automotive, Telecom, Beverage, Retail, etc.), leveraging our deep network of regional and national contacts.
- **Customized Outreach:** We will craft tailored pitches for each top-tier prospect, moving beyond generic emails to create compelling business cases that solve their specific marketing objectives.
- **Deliverable:** A transparent Monthly Prospecting & Pipeline Report, giving the City a real-time view of our sales activities, conversations, and projected deal closures.

Phase 4: Negotiation & Contracting

We will serve as the City's expert representative to secure the most favorable terms possible.

- **Deal Structuring & Negotiation:** We will lead all negotiations, structuring deals that maximize revenue and in-kind value for the City.
- **Streamlined Contracting:** We will develop standardized term sheets and work closely with the City Attorney's office to ensure an efficient and rigorous contracting process.
- **Deliverable:** Executed Partnership Agreements that form the basis of a new, sustainable revenue stream.

Phase 5: Activation & Fulfillment – The Instigo On-the-Ground Advantage

Successful partnerships are not just signed; they are activated flawlessly. Unlike out-of-state firms, all partner activations will be personally project-managed by our Lead Consultant, Samson Oni. He is a resident of and works directly within the Central Florida region. This means the strategist who developed the partnership and understands its nuances is the same person overseeing its execution on the ground. This eliminates communication gaps and ensures the strategic vision is carried out with precision.

- **In-Person Site Visits:** Weeks before any major activation, we will conduct in-person walkthroughs with sponsor representatives and City staff at the specific locations, whether at Coachman Park or a local recreation center. This allows us to map out guest flow, check power and data connectivity, and solve logistical challenges before they become day-of-event problems.
- **Real-Time Problem Solving:** During major activations and signature events, our Lead Consultant will be physically present to ensure a flawless experience for both the sponsor and the public.
- **White-Glove Service:** We will personally greet sponsor representatives upon arrival, oversee their setup, and serve as their dedicated concierge throughout the event. This high-touch service fosters stronger relationships, significantly increasing the likelihood of partnership renewal.
- **City Staff Augmentation:** Our on-site presence frees up Parks and Recreation staff to focus on their core responsibilities of running a safe and successful event, rather than managing sponsor logistics. We act as the City's professional extension, ensuring the business of the partnership is handled.
- **Post-Activation Reporting & Intelligence:** Our on-the-ground presence enriches our ability to report on a partnership's success. We will capture high-quality photos and videos of every activation in person. This content, combined with qualitative feedback gathered directly from attendees and sponsors on-site, allows us to build a comprehensive Fulfillment & ROI Report that tells a story of success far beyond simple metrics.

Phase 6: Reporting & Renewal

To achieve long-term success and growth, we focus on demonstrating value and building lasting relationships.

Performance Reporting: For each major partner successfully solicited, we will produce a comprehensive Fulfillment & ROI Report, including metrics such as media impressions, on-site attendance, digital engagement, and activation photos. This directly addresses the need for measurable results.

Relationship Management: We will conduct annual partnership review meetings to discuss successes and plan for the future.

Deliverable: A high sponsor retention rate and consistent year-over-year revenue growth for the City's sponsorship program.

Bringing the Vision to Life: Strategies for Achieving Measurable Revenue Results

Our methodology comes to life through innovative activations designed for Clearwater's unmonetized assets. The following initiatives are tangible examples of our approach:

1. The "Coachman Park Founding Partners" Program

With the venue's naming rights secured, we will focus on the park itself. This program will offer category-exclusive partnerships for the park's other main zones, such as the grand plaza, gardens, and the signature splash pad and playground. This creates a cohesive family of brands that are deeply integrated into the park experience.

- **The Opportunity:** The world-class zones within the new Coachman Park, including the Grand Plaza, the signature Playground & Splash Pad, and the Gardens.
- **Our Strategy:** We will package these assets into a "Coachman Park Founding Partners" program, offering category-exclusive, multi-year agreements to a limited number of premier brands. This creates a cohesive and uncluttered partnership ecosystem.
- **Measurable Revenue Result:** To secure 2-3 new naming rights or founding partner agreements for Coachman Park within the first 12 months of our engagement, with each agreement modeled after the financial scale and long-term structure of current Clearwater partnerships and partnerships in comparable neighborhoods.

2. The "Clearwater Innovation Lab"

This initiative positions Clearwater as a forward-thinking city. We will leverage the City's Greenprint plan to create "The Green Ripple," inviting a partner like Duke Energy to sponsor a network of artistically designed, solar-powered charging stations. We will also develop "The Wellness Wave," a program perfectly suited for collaboration with existing partner BayCare Health System to extend their health-and-wellness mission beyond the amphitheater and into the City's trails and recreational facilities.

3. Hyper-Local Experiential Moments

This focuses on creating unique, shareable experiences that leverage Clearwater's core identity. We will create "The Sunset Stage," a series of exclusive, pop-up acoustic concerts on the beach sponsored by a lifestyle brand like Corona, generating social media buzz that money can't buy.

- **The Opportunity:** Key community events like the Sea-Blues Festival, Clearwater Celebrates America, and the Turkey Trot.
- **Our Strategy:** We will restructure the sponsorship offerings with new, high-value inventory. For the Sea-Blues Festival, we can introduce a "Sunset Stage" concept as a new, premium asset that is exclusive, branded acoustic performance on the beach. For the Turkey Trot, we can create a "Presenting Wellness Partner" tier, directly tying into a "Wellness Wave" initiative.
- **Measurable Revenue Result:** To increase year-over-year cash and in-kind sponsorship revenue by 25-40% for each signature event by implementing a tiered partnership structure and introducing new, high-value sellable assets.

Navigating Challenges & Ensuring Success

Our experience allows us to anticipate and mitigate potential challenges:

- **Challenge:** A competitive Tampa Bay sponsorship market.
 - **Our Solution:** The exclusivity established by the BayCare and Floridacentral deals actually clarifies the market. We can now offer brands in other sectors a powerful, uncluttered platform to connect with the Clearwater community in a way that larger, multi-sponsor venues cannot.
- **Challenge:** Demonstrating clear ROI to new sponsors.
 - **Our Solution:** The existing partnerships provide a template for the types of entitlements and benefits that attract major brands. We will build on this model, creating packages with robust and measurable digital, social media, and on-site activation rights.
- **Challenge:** Integrating new sponsors with existing partners.
 - **Our Solution:** We see this as an opportunity. We will facilitate a collaborative environment, creating activation concepts that encourage new sponsors to partner with current partners on park-wide initiatives, creating a more cohesive and valuable experience for all.

Proposed Fee

The Consultant's proposed fee for providing Corporate Sponsorship Consultant Services is structured as a percentage commission based on the value of each sponsorship along with a retainer. The proposed fee includes all costs the Consultant anticipates incurring during the performance of this RFP. Below is the detailed commission structure and retainer:

Sponsorship/Naming Rights Deal	Percentage Commission (%)
All Deals	12%

- A retainer of \$66,000 (can be paid as a monthly retainer of \$5,500 per month for the term of agreement;
- Commission based on gross sales revenue

Required Forms



Address:

7901 4th St. N, 300
St. Petersburg
FL. 77302

Phone:

T(US): + 1 (321) 421-5776
T(UK): +44 (7888) 866 761

Catch us online:

info@instigoagency.com
www.instigoagency.com

SCRUTINIZED COMPANIES FORMS

SCRUTINIZED COMPANIES THAT BOYCOTT ISRAEL LIST CERTIFICATION FORM

THIS FORM MUST BE COMPLETED AND SUBMITTED WITH THE BID/PROPOSAL.
FAILURE TO SUBMIT THIS FORM AS REQUIRED MAY DEEM YOUR SUBMITTAL
NONRESPONSIVE.

The affiant, by virtue of the signature below, certifies that:

1. The vendor, company, individual, principal, subsidiary, affiliate, or owner is aware of the requirements of section 287.135, Florida Statutes, regarding companies on the Scrutinized Companies that Boycott Israel List, or engaged in a boycott of Israel; and
2. The vendor, company, individual, principal, subsidiary, affiliate, or owner is eligible to participate in this solicitation and is not listed on the Scrutinized Companies that Boycott Israel List, or engaged in a boycott of Israel; and
3. "Boycott Israel" or "boycott of Israel" means refusing to deal, terminating business activities, or taking other actions to limit commercial relations with Israel, or persons or entities doing business in Israel or in Israeli-controlled territories, in a discriminatory manner. A statement by a company that it is participating in a boycott of Israel, or that it has initiated a boycott in response to a request for a boycott of Israel or in compliance with, or in furtherance of, calls for a boycott of Israel, may be considered as evidence that a company is participating in a boycott of Israel; and
4. If awarded the Contract (or Agreement), the vendor, company, individual, principal, subsidiary, affiliate, or owner will immediately notify the City of Clearwater in writing, no later than five (5) calendar days after any of its principals are placed on the Scrutinized Companies that Boycott Israel List, or engaged in a boycott of Israel.

[Signature]

Authorized Signature

SAMSON ONI

Printed Name

CEO

Title

INSTAGO, LLC

Name of Entity/Corporation

STATE OF

Florida

COUNTY OF

Orange

The foregoing instrument was acknowledged before me by means of ☒ physical presence or ☐ online notarization on, this 9 day of September, 2025, by Samson Daya Oni (name of person whose signature is being notarized) as the CEO (title) of Instago, LLC (name of corporation/entity), personally known _____, or produced FL Driver License (type of identification) as identification, and who did/did not take an oath.



JIA YI PENG
Notary Public
State of Florida
Comm# HH255442
Expires 6/18/2026

Notary Public

Printed Name

[Signature]
Jia Yi Peng

My Commission Expires:
NOTARY SEAL ABOVE

6/18/2026

SCRUTINIZED COMPANIES FORMS

**SCRUTINIZED COMPANIES AND BUSINESS OPERATIONS WITH
CUBA AND SYRIA CERTIFICATION FORM**

**IF YOUR BID/PROPOSAL IS \$1,000,000 OR MORE, THIS FORM MUST BE COMPLETED AND
SUBMITTED WITH THE BID/PROPOSAL. FAILURE TO SUBMIT THIS FORM AS REQUIRED MAY
DEEM YOUR SUBMITTAL NONRESPONSIVE.**

The affiant, by virtue of the signature below, certifies that:

1. The vendor, company, individual, principal, subsidiary, affiliate, or owner is aware of the requirements of section 287.135, Florida Statutes, regarding companies on the Scrutinized Companies with Activities in Sudan List, the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, or engaging in business operations in Cuba and Syria; and
2. The vendor, company, individual, principal, subsidiary, affiliate, or owner is eligible to participate in this solicitation and is not listed on either the Scrutinized Companies with Activities in Sudan List, the Scrutinized Companies with Activities in the Iran Petroleum Sector List, or engaged in business operations in Cuba and Syria; and
3. Business Operations means, for purposes specifically related to Cuba or Syria, engaging in commerce in any form in Cuba or Syria, including, but not limited to, acquiring, developing, maintaining, owning, selling, possessing, leasing or operating equipment, facilities, personnel, products, services, personal property, real property, military equipment, or any other apparatus of business or commerce; and
4. If awarded the Contract (or Agreement), the vendor, company, individual, principal, subsidiary, affiliate, or owner will immediately notify the City of Clearwater in writing, no later than five (5) calendar days after any of its principals are placed on the Scrutinized Companies with Activities in Sudan List, the Scrutinized Companies with Activities in the Iran Petroleum Sector List, or engaged in business operations in Cuba and Syria.

Authorized Signature

SAMSON ONI

Printed Name

CEO

Title

INSTIGO, LLC

Name of Entity/Corporation

STATE OF Florida

COUNTY OF Orange

The foregoing instrument was acknowledged before me by means of ☒ physical presence or ☐ online notarization on, this 9 day of September, 2025, by Samson Dayo Oni (name of person whose signature is being notarized) as the CEO (title) of Instigo, LLC (name of corporation/entity), personally known _____, or produced FL Driver License (type of identification) as identification, and who did/did not take an oath.



JIA YI PENG
Notary Public
State of Florida
Comm# HH255442
Expires 6/18/2026

Notary Public

Printed Name

My Commission Expires: 6/18/2026
NOTARY SEAL ABOVE

Compliance with Anti-Human Trafficking Laws

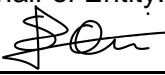
Pursuant to Section 787.06 (13), Florida Statutes, this form must be completed by an officer or representative of a non-governmental entity when a contract is executed, renewed, or extended between the non-governmental entity and the City of Clearwater.

The undersigned, on behalf of the entity listed below ("Entity"), hereby attests under penalty of perjury that:

Entity does not use coercion for labor or services as defined in Section 787.06, Florida Statutes.

The undersigned is authorized to execute this form on behalf of Entity.

Date: Sept. 9, 2025

Signed: 

Entity: Instigo

Name: Samson Oni

Title: CEO

Request for Taxpayer Identification Number and Certification

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

► Go to 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.	
	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. <input type="checkbox"/> Individual/sole proprietor or single-member LLC <input type="checkbox"/> 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. <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 FATCA reporting code (if any) _____ <i>(Applies to accounts maintained outside the U.S.)</i>
	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.

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									
				-					

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 ► 07/11/2025
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General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9.

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.

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. If applicable, you are also certifying that as a U.S. person, your allocable share of any partnership income from a U.S. trade or business is not subject to the withholding tax on foreign partners' share of effectively connected income, and
4. 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).

Special rules for partnerships. Partnerships that conduct a trade or business in the United States are generally required to pay a withholding tax under section 1446 on any foreign partners' share of effectively connected taxable income from such business. Further, in certain cases where a Form W-9 has not been received, the rules under section 1446 require a partnership to presume that a partner is a foreign person, and pay the section 1446 withholding tax. Therefore, if you are a U.S. person that is a partner in a partnership conducting a trade or business in the United States, provide Form W-9 to the partnership to establish your U.S. status and avoid section 1446 withholding on your share of partnership income.

In the cases below, the following person must give Form W-9 to the partnership for purposes of establishing its U.S. status and avoiding withholding on its allocable share of net income from the partnership conducting a trade or business in the United States.

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

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, do not use Form W-9. Instead, use the appropriate Form W-8 or Form 8233 (see Pub. 515, *Withholding of Tax on Nonresident Aliens and Foreign Entities*).

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 his or her 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 his or her 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 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 under 4 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.

Also see *Special rules for partnerships*, earlier.

What is FATCA Reporting?

The Foreign Account Tax Compliance Act (FATCA) requires a participating foreign financial institution to report all United States account holders that are specified United States 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 no longer are 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.

a. **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: 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 1040/1040A/1040EZ you filed with your application.

b. **Sole proprietor or single-member LLC.** Enter your individual name as shown on your 1040/1040A/1040EZ on line 1. You may enter your business, trade, or "doing business as" (DBA) name on line 2.

c. **Partnership, LLC that is not a single-member LLC, C corporation, or S corporation.** 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.

d. **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. You may enter any business, trade, or DBA name on line 2.

e. **Disregarded entity.** For U.S. federal tax purposes, an entity that is disregarded as an entity separate from its owner is treated as a "disregarded entity." See Regulations section 301.7701-2(c)(2)(iii). Enter the owner's name on line 1. The name of the entity 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, "Business name/disregarded entity name." 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, you may enter it on line 2.

Line 3

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

IF the entity/person on line 1 is a(n) . . .	THEN check the box for . . .
• Corporation	Corporation
• Individual • Sole proprietorship, or • Single-member limited liability company (LLC) owned by an individual and disregarded for U.S. federal tax purposes.	Individual/sole proprietor or single-member LLC
• LLC treated as a partnership for U.S. federal tax purposes, • LLC that has filed Form 8832 or 2553 to be taxed as a corporation, or • LLC that is disregarded as an entity separate from its owner but the owner is another LLC that is not disregarded for U.S. federal tax purposes.	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 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 in 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 possession, 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 possession
- 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
- 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 Income, 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) written or printed 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 possession, 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, write 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 individual taxpayer identification number (ITIN). Enter it in the social security number box. 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). Do not enter the disregarded entity's EIN. 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 1-800-772-1213. 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/Businesses and clicking on Employer Identification Number (EIN) under Starting a Business. 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 SS-4 mailed to you within 10 business days.

If you are asked to complete Form W-9 but do not have a TIN, apply for a TIN and write "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, generally you will 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.

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 Form 1099 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

For this type of account:	Give name and EIN of:
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 under the Form 1041 Filing Method or the Optional Form 1099 Filing Method 2 (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 and you may also enter your business or DBA name on the "Business name/disregarded entity" name line. 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.) Also see *Special rules for partnerships*, earlier.

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

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 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 credit report, contact the IRS Identity Theft Hotline at 1-800-908-4490 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 1-877-777-4778 or TTY/TDD 1-800-829-4059.

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 1-800-366-4484. 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.

Visit 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 possessions for use in administering their laws. The information also may 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, payers must generally withhold a percentage of taxable interest, dividend, and certain other payments to a payee who does not give a TIN to the payer. Certain penalties may also apply for providing false or fraudulent information.