

Basic Information for Doing Business with AARP

AARP is a nonprofit, nonpartisan membership organization for people 50 and over. We provide information and resources; advocate on legislative, consumer, and legal issues; assist members to serve their communities; and offer a wide range of unique benefits, special products, and services for our members. These benefits include *AARP Web place* at www.aarp.org, *AARP the Magazine* and *AARP VIVA*, and the monthly *AARP Bulletin*. Active in every state, the District of Columbia, Puerto Rico, and the U.S. Virgin Islands, AARP celebrates the attitude that age is just a number and life is what you make it.

Please note that only forms submitted by a staff member will be added to the supplier database.

Part I

Supplier Information

<p>Company Name: (as appears on invoice)</p> <p>_____</p> <p>_____</p> <p>Main Address:</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>Other locations:</p> <p>Contact: _____</p> <p>Phone # _____</p> <p>Fax# _____</p> <p>e-mail _____</p> <p>Tax ID # _____</p> <p>DUNS # _____</p> <p>_____</p> <p>For Purchasing use Only:</p> <p>Account # assigned: _____</p> <p>Vendor Category(s) : _____</p> <p>Insurance Certificate # _____</p>	<p>1). Minority Owned (yes/no)?</p> <p>2). Certified (yes/no)?</p> <p>3). With whom?</p> <p>If yes, please identify below and attach copy of certification</p> <p><input type="checkbox"/> African American</p> <p><input type="checkbox"/> Asian American</p> <p><input type="checkbox"/> Asian Pacific</p> <p><input type="checkbox"/> Hispanic American</p> <p><input type="checkbox"/> Native American</p> <p><input type="checkbox"/> Women</p> <p>Our commitment to supplier diversity goes beyond the groups above to include the following:</p> <p><input type="checkbox"/> Disabled Veterans</p> <p><input type="checkbox"/> Sheltered Workshops</p> <p><input type="checkbox"/> LGBT</p> <p>4). What percentage of your business is sourced through “Second Tier/Minority” protected class vendors? _____</p> <p>We require a quarterly report for Second Tier Spend.</p> <p>_____</p> <p>Products, Services, Certifications, Specialties Offered to the AARP: (Use NIGP Codes if known)</p>
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For National Office Employees, please return this page to AARP’s PCM National Office Department:

Fax Number: 202-434-3179 or Email to: RRoberts@AARP.org

For SNI or Lakewood Employees, please return this page to AARP’s Lakewood Office Department: Fax Number: 562-421-2051 or Email to: LLANDERO@AARP.ORG

AARP STANDARD PAYMENT TERMS ARE: ACH (AUTOMATED CLEARING HOUSE) "NET 30" DAYS AND "NET 45" DAYS BY CHECK. PLEASE COMPLETE PARTS II AND III OF THIS FORM AND RETURN IT TO THE AARP CONTACT LISTED AT THE BOTTOM OF THE PAGE, ALONG WITH A COMPLETED (SIGNED) W-9 FORM. PLEASE COMPLETE PART III IF YOU ARE INTERESTED IN ACH DIRECT DEPOSIT. *TO ENSURE TIMELY PAYMENT, PLEASE BE SURE THAT ALL INVOICES REFERENCE YOUR REMIT ADDRESS INFORMATION PROVIDED BELOW.*

Part II Remit Payment Information

Remit Payment Name: _____ Tax ID#: _____

Remit Address: _____

_____ Phone# _____
Fax #: _____

Accts. Rec. Contact: _____

Email Address: _____ (required for notification)

Part III ACH BANKING INFORMATION

Bank Name: _____

Address (City, State): _____

Bank Routing Number: _____

Bank Account Number: _____

(Choose One Account Only)

CHECKING _____ SAVINGS _____

Utilize same Banking information for all remit addresses with this tax id: Yes _____ No _____

REQUIRED: PLEASE ATTACH COPY OF A VOIDED CHECK OR BANK LETTER FOR VALIDATION

I authorize the AARP to initiate credits to my account for payment of vendor invoices. This authority will remain in effect until cancelled by me in writing.

Approval Signature

Date

Printed Name

Contact for questions: Name _____ Phone _____

ACH Form Submittal:

Mail	Email	Fax
AARP Attention: Nestor Blanco 601 E Street NW Washington, DC 20049	NBlanco@aarp.org	866-368-7411

Note: AARP validates all ACH information; checks will be generated until banking information has been validated.

Request for Taxpayer Identification Number and Certification

**Give form to the
 requester. Do not
 send to the IRS.**

Print or type See Specific Instructions on page 2.	Name	
	Business name, if different from above	
	Check appropriate box: <input type="checkbox"/> Individual/ Sole proprietor <input type="checkbox"/> Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Other ▶	
	<input type="checkbox"/> Exempt from backup withholding	
	Address (number, street, and apt. or suite no.)	
City, state, and ZIP code		
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. For individuals, this is your social security number (SSN). **However, for a resident alien, sole proprietor, or disregarded entity, see the Part I instructions on page 3.** For other entities, it is your employer identification number (EIN). If you do not have a number, see **How to get a TIN** on page 3.

Social security number
+

or

Employer identification number
+

Note: If the account is in more than one name, see the chart on page 4 for guidelines on whose number to enter.

Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me), **and**
2. I am not subject to backup withholding because: **(a)** I am exempt from backup withholding, or **(b)** I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or **(c)** the IRS has notified me that I am no longer subject to backup withholding, **and**
3. I am a U.S. person (including a U.S. resident alien).

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 on page 4.)

Sign Here	Signature of U.S. person ▶	Date ▶
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Purpose of Form

A person who is required to file an information return with the IRS, must obtain your correct taxpayer identification number (TIN) to report, for example, income paid to you, real estate transactions, mortgage interest you paid, acquisition or abandonment of secured property, cancellation of debt, or contributions you made to an IRA.

U.S. person. Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN to the person requesting it (the requester) and, when applicable, to:

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.

Note: If 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.

Foreign person. If you are a foreign person, use the appropriate Form W-8 (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 recipient 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 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.