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## **IMPORTANT TAX INFORMATION**

Please complete the attached W-9 form using the exact information that appears on your tax filing documents. This ensures accurate reporting to the IRS and prevents potential penalties.

**Please Note:** The address provided on the W-9 should be your **current mailing address as will be listed on your tax documents** and **NOT the rental property address**. This ensures all forms and correspondence are directed to the correct location. If you do not currently have a separate mailing address or if your mailing address changes in the future, please contact our office to update this information promptly.

### **Important Information About the Primary Person:**

The primary person is the individual listed first on your tax filing documents (See below). The IRS uses this individual as the reference point for all tax documents and filings. In our system, distributions are typically sent to one person only, and this should be the same individual who receives the 1099 and whose bank account information is provided.

<b>Form 1040</b> Department of the Treasury—Internal Revenue Service <b>U.S. Individual Income Tax Return</b>		<b>2024</b>	OMB No. 1545-0074	IRS Use Only—Do not write or staple in this space.
For the year Jan. 1–Dec. 31, 2024, or other tax year beginning _____, 2024, ending _____, 20_____				See separate instructions.
Your first name and middle initial _____		Last name _____		Your social security number _____-_____-_____-
If joint return, spouse's first name and middle initial _____		Last name _____		Spouse's social security number _____-_____-_____-
Home address (number and street). If you have a P.O. box, see instructions. _____			Apt. no. _____	<b>Presidential Election Campaign</b> Check here if you, or your spouse if filing jointly, want \$3 to go to this fund. Checking a box below will not change your tax or refund. <input type="checkbox"/> You <input type="checkbox"/> Spouse
City, town, or post office. If you have a foreign address, also complete spaces below. _____		State _____	ZIP code _____	
Foreign country name _____		Foreign province/state/county _____		
		Foreign postal code _____		

If there are multiple investors and a reason to separate distributions, accounts, or the 1099 recipient, please contact the property manager to arrange this setup. Otherwise, distributions will default to being sent to one person to ensure consistency and accuracy in reporting.

At the end of each year, we will send a follow-up form to confirm that all information is still accurate or to allow for any necessary updates. Please ensure the information provided aligns with your tax documents to avoid discrepancies or additional charges for reissued 1099 forms.