

**ITN 25-0006 Financial Advisory and Investment Consultant Services
Attachment B - Financial Review Form**

W-9 or W-8 - REQUEST FOR TAXPAYER IDENTIFICATION NUMBER AND CERTIFICATION

For Citizens to complete the financial review process vendor shall submit the following:

- ✓ A current and valid W-9 or W-8 Form. Go to www.irs.gov/FormW9 for instructions and the latest information.
- ✓ A sample invoice. To ensure accurate payments, Citizens requires that the invoice's remit-to name precisely matches the information provided on the vendor's W-9 form, particularly when a DBA name is listed.

CERTIFICATION

Citizens requires this Financial Certification to determine Vendors' Financial Stability. Financial Stability means, at a minimum, having adequate income and capital and the capacity to efficiently allocate resources, assess, and manage financial risks, and maintain financial soundness through the term of the contract. Alternative documentation or assurances may be considered as necessary to determine Financial Stability consistent with Section 3.7 of the solicitation document.

The Vendor **shall submit** this Financial Certification with its response. The vendor must demonstrate Financial Stability to be eligible for contract award. Vendor must be able to respond "YES" to each statement to demonstrate Financial Stability under this Attachment B.

I, _____ am the _____ of
(Authorized Representative) (Title)

_____ hereinafter "Vendor," and am legally authorized to
(Vendor Name)

represent and bind the Vendor. Having been duly sworn, I do hereby certify the following:

1. I have direct knowledge of the financial condition and operations of Vendor.
 YES NO
2. To the best of my knowledge and belief, Vendor has financial resources sufficient to pay its immediate and short-term obligations.
 YES NO
3. To the best of my knowledge and belief, Vendor has financial resources sufficient to pay its long-term obligations and remain in business over the life of the Contract.
 YES NO
4. To the best of my knowledge and belief, Vendor has the capacity to provide the goods or services specified in the Contract.
 YES NO

(Signature)

(Date)