

PROSPECTIVE GRANTEE TIPS FOR COMPLETING W-8 BEN E TAX FORM¹

Fillable form can be found at www.irs.gov/pub/irs-pdf/fw8bene.pdf

Instructions for Form W-8 BEN-E can be found at www.irs.gov/pub/irs-pdf/iw8bene.pdf

PART I: IDENTIFICATION OF BENEFICIAL OWNER

1. The name of **organization** receiving payment
2. Country where the organization was formed
3. Most likely not applicable
4. Identify your type of organization (Chapter 3 status)
5. FATCA status (Chapter 4 status):
The most common organizational statuses are listed below. Choose the one that most closely describes your organization.
 - Foreign government
 - International organization
 - Foreign nonprofit organization, including foreign private foundation
 - Foreign nonprofit that has obtained IRS' 501 (c) organization status
6. Fill in permanent address of organization.
Fill in City or town, State or province, Country, and Postal Code where appropriate.
7. Fill in mailing address, if different than permanent address identified above.
Fill in City or town, State or province, Country, and Postal Code where appropriate.
8. Complete if organization was provided a TIN (Tax Identification Number) by the U.S.A. government.
9. a. If provided a GIIN (Global Intermediary Identification Number), indicate with checkmark. These are only given to PFFI or Registered Deemed Compliant FFIs and will likely not apply.
b. If your country of residence for tax purposes has issued you a taxpayer identification number (TIN), enter it here. If not, leave blank. If your country of residence for tax purposes has issued you a taxpayer identification number (TIN), enter it here. If not, leave blank.
10. For your internal reference only. May leave this blank.

PART II: DISREGARDED ENTITY OR BRANCH RECEIVING PAYMENT

- Unless your organization is an FFI, disregard this section and leave **blank**.

PART III: CLAIM OF TAX TREATY BENEFITS

- If entity is claiming a reduced rate or exemption from withholding under a treaty, type in Country and check box to certify that the entity is a resident of that country. Otherwise, leave this part blank.

PART IV-PART XXVII:

- Answer depending on how you answered Line 5.

If you chose FATCA status of:	Then complete:
Foreign Government	Complete Part XIII
International Organization	Complete Part XIV
501 (c) Organization	Complete Part XXI
Nonprofit Organization	Complete Part XXII

PART XXX: CERTIFICATION

- Sign document and print or type name on line next to signature.
- Fill in date of signature in MM-DD-YYYY format. EXAMPLE: April 28th, 2017 would be 04-28-2017.
- Check box beneath your signature to indicate that you are authorized to sign the form on behalf of the entity identified in Part I.

¹ The officers and staff persons of The McKnight Foundation are not tax professionals and cannot provide professional tax advice. This tip sheet is meant for general guidance only. Please consult your tax professional regarding your organization's particular circumstances. Thank you.