

Market Segment Code Two: 38

Tax ID:

	Applicant 1	Applicant 2	Applicant 3	Applicant 4
Does CAS ID Exist?	Yes			
CAS ID #	[REDACTED]			
Applicant Name:	Plan D, Inc.			
Tax ID/SS#:	[REDACTED]			
Is Client Certified?:	Yes			
Certification Code:	1 Original on File			
Certification Date:	04/20/2007			
Type Of Certification:	W-9			
If W-8, Select Type:				
If W-8, NRA/FE Type:				
Citizenship/Country:	US			
Legal Domicile:	UNITED STATES			
<small>(State of Legal Residence, Incorporation, Trust Domicile)</small>				
Country of Location:	UNITED STATES			
Tax Treaty Benefit Completed:	No			

Additional W8 Information/Comments: State: Delaware

Is this a Discretionary Account? No

Legal Address:
Choose Address...

[REDACTED]

Telephone Number(s):

[Add](#) [Modify](#) [Delete](#)

Telephone Number(s)

No Telephone Numbers Specified

Relationship Team

Client Information Region	
New York	
Banker: Mary C Casey/JPMCHASE	Client Service Team: John P Mailey, Carol R Simon
	CSS Admin Code: EA4
Officer #: [REDACTED]	
	Officer Telephone #:

DDA/MMIA - NDS Account Details

Client Reporting

Beneficiary/Minor Information