

Customer Create/Change Form

Complete information below

ADD

CHANGE

* Indicates Required Information

Customer Name *	<input type="text"/>		
Customer Account No. <small>Customer # to be completed by Novanta</small>	<input type="text"/>	Currency	<input type="text" value="US Dollar \$"/>
Federal Tax No. *	<input type="text"/>	Requested Terms:	<input type="text"/>
Order ship to State - Taxable or Exempt	<input type="text"/>	Requested Credit Limit	<input type="text"/>
Sales Tax Exemption or Resale #: * <small>Novanta automatically calculates sales tax according to the ship to state</small>	<input type="text"/>	<small>Fields below to be filled by Novanta Finance team</small>	
Novanta Nexus States: (See List)	<input type="text"/>	Payment Terms	<input type="text"/>
GST/China Tax ID # (if applicable)	<input type="text"/>	Credit Limit	<input type="text"/>
D-U-N-S Number (if known - not required)	<input type="text"/>	Novanta Business Unit	<input type="text"/>
Industry Segment (select 1 of the following)	<input type="text"/>	Created By:	<input type="text"/>
		Date:	<input type="text"/>

Corporate Address

Company Name Line 1 *	<input type="text"/>		
Company Name Line 2	<input type="text"/>		
Contact / Attention	<input type="text"/>		
Street *	<input type="text"/>		
Zip Code *	<input type="text"/>	Phone	<input type="text"/>
City *	<input type="text"/>	State *	<input type="text"/>
Country *	<input type="text"/>	E-Mail	<input type="text"/>
Bank Data (voluntary information)	<input type="text"/>		

Bill-to Address

Company Name Line 1 *	<input type="text"/>		
Company Name Line 2	<input type="text"/>		
Contact / Attention	<input type="text"/>		
Street *	<input type="text"/>		
Zip Code *	<input type="text"/>	Phone	<input type="text"/>
City *	<input type="text"/>	State *	<input type="text"/>
Country *	<input type="text"/>	E-Mail *	<input type="text"/>
Finance E-mail to be used for E-Invoicing *	<input type="text"/>		

Ship-to Address

Company Name Line 1 *	<input type="text"/>		
Company Name Line 2	<input type="text"/>		
Contact / Attention	<input type="text"/>		
Street *	<input type="text"/>		
Zip Code *	<input type="text"/>	Phone	<input type="text"/>
City *	<input type="text"/>	State *	<input type="text"/>
Country *	<input type="text"/>	E-Mail	<input type="text"/>
Shipping Method Preference *	<input type="text"/>		
Shipping Account Number (Collect)	<input type="text"/>		



ATI INDUSTRIAL AUTOMATION, Inc
1031 Goodworth Drive
Apex, NC 27539
919-772-0115
919-772-8259 (fax)

ACH / WIRE TRANSFER INFORMATION

BANK: Truist Bank

BANK ADDRESS: 801 E Williams St. Apex, 27502

BANK TELEPHONE NUMBER: 919-362-7531

BANK ABA NUMBER: 053101121

ATI BANK ACCOUNT NUMBER: 0005211921295

SWIFT CODE: BRBTUS33

**WHEN PAYMENTS ARE MADE PLEASE SEND
REMITTANCE INFORMATION TO**

ati-ar@novanta.com

Request for Taxpayer Identification Number and Certification

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

▶ Go to www.irs.gov/FormW9 for instructions and the latest information.

Print or type. See Specific Instructions on page 3.	1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank. ATI Industrial Automation Inc.		
	2 Business name/disregarded entity name, if different from above		
	3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only one of the following seven boxes.		4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3): Exempt payee code (if any) _____ Exemption from FATCA reporting code (if any) _____ <i>(Applies to accounts maintained outside the U.S.)</i>
	<input type="checkbox"/> Individual/sole proprietor or single-member LLC <input checked="" type="checkbox"/> C Corporation <input type="checkbox"/> S Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate <input type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ▶ _____ Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is not disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner. <input type="checkbox"/> Other (see instructions) ▶ _____		
	5 Address (number, street, and apt. or suite no.) See instructions. 1031 Goodworth Drive		Requester's name and address (optional)
	6 City, state, and ZIP code Apex, NC 27539-3869		
	7 List account number(s) here (optional)		

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Note: If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number									
or									
Employer identification number									
5	6	-	1	6	6	6	6	9	3

Part II Certification

Under penalties of perjury, I certify that:

- 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
- 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
- I am a U.S. citizen or other U.S. person (defined below); and
- The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

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 for Part II, later.

Sign Here	Signature of U.S. person ▶ <i>Angela Dunn</i>	Date ▶ 1-10-22
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General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9.

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (interest earned or paid)
- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.



To Our Valued Customer:

We are in need of your current Sales Tax Exemption Certificate or Resale Certificate for our files.

If you believe that your purchases are exempt from sales tax, please check the box and return with the appropriate tax document.

Purchase is taxable

Purchases are for resale or are component parts to be used in manufacturing

We have a Direct Pay Permit from the state

We appreciate your prompt assistance in this matter.

Thank you in advance for your cooperation,

Angela Dunn

Credit & Collection Manager

ATI Industrial Automation Inc, a Novanta Company

Direct Phone: 315-218-1331

angela.dunn@novanta.com

UNIFORM SALES & USE TAX CERTIFICATE—MULTIJURISDICTION

The below-listed states have indicated that this form of certificate is acceptable, subject to the notes on pages 2-4. The issuer and the recipient have the responsibility of determining the proper use of this certificate under applicable laws in each state, as these may change from time to time.

Issued to Seller: _____

Address: _____

I certify that:

Name of Firm (Buyer): _____

Address: _____

is engaged as a registered

- Wholesaler
- Retailer
- Manufacturer
- Seller (California)
- Lessor (see notes on pages 2-4)
- Other (Specify) _____

and is registered with the below listed states and cities within which your firm would deliver purchases to us and that any such purchases are for wholesale, resale, ingredients or components of a new product or service¹ to be resold, leased, or rented in the normal course of business. We are in the business of wholesaling, retailing, manufacturing, leasing (renting) the following:

Description of Business: _____

General description of tangible property or taxable services to be purchased from the seller: _____

State	State Registration, Seller's Permit, or ID Number of Purchaser	State	State Registration, Seller's Permit, or ID Number of Purchaser
AL ¹	_____	MO ¹⁶	_____
AR	_____	NE ¹⁷	_____
AZ ²	_____	NV	_____
CA ³	_____	NJ	_____
CO ⁴	_____	NM ^{4,18}	_____
CT ⁵	_____	NC ¹⁹	_____
DC ⁶	_____	ND	_____
FL ⁷	_____	OH ²⁰	_____
GA ⁸	_____	OK ²¹	_____
HI ^{4,9}	_____	PA ²²	_____
ID	_____	RI ²³	_____
IL ^{4,10}	_____	SC	_____
LA	_____	SD ²⁴	_____
KS	_____	TN	_____
KY ¹¹	_____	TX ²⁵	_____
ME ¹²	_____	UT	_____
MD ¹³	_____	VT	_____
MI ¹⁴	_____	WA ²⁶	_____
MN ¹⁵	_____	WI ²⁷	_____

I further certify that if any property or service so purchased tax free is used or consumed by the firm as to make it subject to a Sales or use Tax we will pay the tax due directly to the proper taxing authority when state law so provides or inform the seller for added tax billing. This certificate shall be a part of each order which we may hereafter give to you, unless otherwise specified, and shall be valid until canceled by us in writing or revoked by the city or state.

Under penalties of perjury, I swear or affirm that the information on this form is true and correct as to every material matter.

Authorized Signature: _____
(Owner, Partner or Corporate Officer)

Title: _____

Date: _____