



Dear Valued Supplier:

This letter is to inform you that Research Triangle Institute has received a **Direct Pay Permit for Sales and Use Taxes** from the North Carolina Department of Revenue. As certified in the attached permit, Research Triangle Institute has assumed responsibility for the direct payment of tax on all purchases that are within the scope of this permit. Accordingly, you are relieved from the obligation of charging NC sales tax on these purchases.

Please update your billing system immediately so that NC sales tax will not be charged on any invoices sent to Research Triangle Institute, including invoices addressed to trade names RTI International or RTI Health Solutions. **Invoices that are received with NC sales tax charged will be sent back to you for revision.**

We have also included exemption certificates for sales shipped to other states, as summarized below:

State	Reason for Exemption	Identification Number (if required)
NC	Direct Pay Permit	Permit # 00639
DC	501(c)(3) Exempt Organization	Certificate # 350000006693
FL	501(c)(3) Exempt Organization	Certificate # 85-8014994804C-0
IL	501(c)(3) Exempt Organization	Exemption ID # E9938-0188-03
MD	501(c)(3) Exempt Organization	Account # 31136741
MA	501(c)(3) Exempt Organization	Exemption # 560-686-338
MI	501(c)(3) Exempt Organization	EIN 56-0686338
NJ	501(c)(3) Exempt Organization	Exempt Org # 560-686-338/000
NY	501(c)(3) Exempt Organization	Exempt Org # EX-232044
VA	501(c)(3) Exempt Organization	Exemption # SE560686338F03122029

Thank you for your assistance. Should you have any questions, please email acolejr@rti.org.

Research Triangle Institute
Corporate Tax Department



**Direct Pay Permit
for Sales and Use Taxes
on Tangible Personal Property**

North Carolina Department of Revenue

Permit Number: 00639

Issue Date: November 4, 2011

Issued To: Research Triangle Institute

Address: 3040 Cornwallis Road,
Research Triangle Park, North Carolina 27709

This permit is issued under N.C.G.S. 105-164.27A. It certifies that the North Carolina Department of Revenue has issued a direct pay permit to the business named on the permit. The permit authorizes a retail or wholesale merchant to whom it is presented to sell tangible personal property to the business named on the permit without collecting sales or use tax on the sale, if the sale is within the scope of the permit. Bulletin 46-1 of the Sales and Use Tax Technical Bulletins lists the taxes that are not subject to the direct pay permit. The business named on this permit has assumed responsibility for the direct payment of tax on all purchases that are within the scope of the permit.

A vendor to whom this permit is presented must keep a record of the permit in its files. The record can be in paper or electronic form.

If the Secretary of Revenue cancels or revokes this permit, the permit is no longer valid. When a taxpayer's permit is cancelled or revoked, a vendor must collect sales and use tax on sales made to taxpayer after the effective date of the cancellation or revocation. A taxpayer whose permit is cancelled or revoked is required to notify its vendors of the cancellation or revocation and the effective date of the action.

Issued By: *Eric H. Wayne*
Director of Sales and Use Tax Division
North Carolina Department of Revenue

GOVERNMENT OF THE DISTRICT OF COLUMBIA

OFFICE OF TAX AND REVENUE

CERTIFICATE OF EXEMPTION

ISSUED PURSUANT TO DISTRICT OF COLUMBIA SALES AND USE TAX ACCOUNTS

THIS CERTIFIES THAT

RESEARCH TRIANGLE INSTITUTE
DBA: RESEARCH TRIANGLE INSTITUTE
701 13TH ST NW STE 750
WASHINGTON DC 20005-3967

ACCOUNT ID

350-000006693

CERTIFICATE NUMBER

L0012818343

Is entitled to the exemption described below from Sales & Use Tax under the authority
of the District of Columbia Sales & Use Tax Acts.

EFFECTIVE EXPIRATION

13-Nov-2024 13-Nov-2029

THIS CERTIFICATE IS NON TRANSFERABLE

OFFICE OF TAX AND REVENUE

FR-164 EXEMPTION

IRS Code Section: 501(c)(3)

Your exemption from Sales & Use Tax is valid from the effective to the expiration date stated. See Sales and Use Tax Exemption under DC Code §47-2005(3).

IRS Determination Date: 13-Apr-1960





Consumer's Certificate of Exemption

Issued Pursuant to Chapter 212, Florida Statutes

DR-14
R. 01/18

85-8014994804C-0	06/30/2023	06/30/2028	501(C)(3) ORGANIZATION
Certificate Number	Effective Date	Expiration Date	Exemption Category

This certifies that

RESEARCH TRIANGLE INSTITUTE INC
3040 CORNWALLIS RD
RESEARCH TRIANGLE PARK NC 27709-0155

is exempt from the payment of Florida sales and use tax on real property rented, transient rental property rented, tangible personal property purchased or rented, or services purchased.



Important Information for Exempt Organizations

DR-14
R. 01/18

1. You must provide all vendors and suppliers with an exemption certificate before making tax-exempt purchases. See Rule 12A-1.038, Florida Administrative Code (F.A.C.).
2. Your *Consumer's Certificate of Exemption* is to be used solely by your organization for your organization's customary nonprofit activities.
3. Purchases made by an individual on behalf of the organization are taxable, even if the individual will be reimbursed by the organization.
4. This exemption applies only to purchases your organization makes. The sale or lease to others of tangible personal property, sleeping accommodations, or other real property is taxable. Your organization must register, and collect and remit sales and use tax on such taxable transactions. Note: Churches are exempt from this requirement except when they are the lessor of real property (Rule 12A-1.070, F.A.C.).
5. It is a criminal offense to fraudulently present this certificate to evade the payment of sales tax. Under no circumstances should this certificate be used for the personal benefit of any individual. Violators will be liable for payment of the sales tax plus a penalty of 200% of the tax, and may be subject to conviction of a third-degree felony. Any violation will require the revocation of this certificate.
6. If you have questions about your exemption certificate, please call Taxpayer Services at 850-488-6800. The mailing address is PO Box 6480, Tallahassee, FL 32314-6480.

Verify that all of your Illinois Sales Tax Exemption Certificate information is correct

- ✓ If not, contact us immediately.
- ✓ **Do not discard** - your Illinois Sales Tax Exemption Certificate is an important tax document that authorizes you to purchase tangible personal property for use or consumption tax-free.

OFFICIAL DOCUMENT

State of Illinois - Department of Revenue

OFFICIAL DOCUMENT

Illinois Sales Tax Exemption Certificate



RESEARCH TRIANGLE INSTITUTE

RTI INTERNATIONAL
3040 CORNWALLIS RD
RESEARCH TRIANGLE PARK NC 27709-0155

Sales Tax Exemption Certificate

Issue date:

04/17/2020

Expiration date:

05/01/2025

Sales Tax Exemption

E99380188

Organization type:

Charitable

This entity is authorized under the Retailers' Occupation Tax Act to purchase tangible personal property for use or consumption tax-free.

 **ILLINOIS REVENUE**
[Signature]
Director

OFFICIAL DOCUMENT - DO NOT DESTROY

RESEARCH TRIANGLE INST
PO BOX 12194
RESEARCH TRIANGLE PK, NC 27709

Notice to exempt organizations holding previously-issued exemption certificates

The Comptroller of Maryland's Revenue Administration Division is re-issuing sales tax exemption certificates to all organizations that continue to qualify. Your organization's new certificate is attached and is valid effective immediately. Previously issued exemption certificates become invalid on October 1, 2022. Vendors are required to charge tax on sales made on or after October 1, 2022, to any organization which does not present a new certificate at the time of sale.

If your organization deals regularly with certain vendors, we suggest that you contact them before October 1, 2022, so they can verify that your organization has been issued a new certificate.

The re-issuance of these certificates does not change current procedures for claiming resale exclusions by exempt organizations engaged in purchasing tangible personal property for sale. The sales and use tax registration numbers of licensed vendors have not been changed and the validity of blanket resale certificates bearing these numbers is unaffected.

Only one certificate will be provided to organizations with more than one location.

Comptroller of Maryland
Revenue Administration Division
P.O. Box 549-SUTEC
Annapolis, Maryland 21404-0549

The attached card is your organization's new exemption certificate which is valid upon receipt and effective until the expiration date designated on its face. See Business Tax Tip #6 at www.marylandtaxes.gov and the instructions on the back of the card for the proper use of the exemption certificate. If you have any questions regarding the use of this card, call Taxpayer Services Division at (410) 260-7980, toll free 1-800-638-2937, or e-mail taxhelp@marylandtaxes.gov.

Comptroller of Maryland Sales and Use Tax Exemption Certificate

Account Number 31136741

Expiration Date
09/30/2027

Name RESEARCH TRIANGLE INST
701 13TH STREET NW
SUITE 750
WASHINGTON, DC 20005



PLEASE LAMINATE THIS CARD

11038

NONGOV-1 (2/22)



**Form ST-2
Certificate of Exemption**

**Massachusetts
Department of
Revenue**

Certification is hereby made that the organization herein is an exempt purchaser under General Laws, Chapter 64H, section 6(d) or (e). All purchases of tangible personal property by this organization are exempt from taxation under said chapter to the extent that such property is used in the conduct of the business of the purchaser. Any abuse or misuse of this certificate by any tax-exempt organization or any unauthorized use of this certificate by any individual constitutes a serious violation and will lead to revocation. Willful misuse of this Certification of Exemption is subject to criminal sanctions of up to one year in prison and \$10,000 (\$50,000 for corporations) in fines.

**RESEARCH TRIANGLE INSTITUTE
3040 CORNWALLIS RD
RESEARCH TRIANGLE PARK NC 27709-2194**

**EXEMPTION NUMBER
560 686 338
ISSUE DATE
04/15/15
CERTIFICATE EXPIRES ON
04/15/25**

NOT ASSIGNABLE OR TRANSFERABLE

COMMISSIONER OF REVENUE

Michigan Sales and Use Tax Certificate of Exemption

DO NOT send to the Department of Treasury. Certificate must be retained in the Seller's Records. This certificate is invalid unless all four sections are completed by the purchaser.

SECTION 1: TYPE OF PURCHASE

One-time purchase.
Order or Invoice Number: _____

Blanket certificate.
Expiration Date (maximum of four years): _____

Blanket Certificate. Recurring business relationship

The purchaser hereby claims exemption on the purchase of tangible personal property and selected services made from the vendor listed below. This certifies that this claim is based upon the purchaser's proposed use of the items or services, OR the status of the purchaser.

Vendor's Name and Address

SECTION 2: ITEMS COVERED BY THIS CERTIFICATE

Check one of the following:

1. All items purchased
2. Limited to the following items: _____

SECTION 3: BASIS FOR EXEMPTION CLAIM

Check one of the following:

1. For Resale at Retail. Enter Sales Tax License Number: _____
2. For Lease. Enter Use Tax Registration Number: _____

The following exemptions DO NOT require the purchaser to provide a number:

3. For Resale at wholesale
4. Agricultural Production. Enter percentage: _____%
5. Industrial Processing. Enter percentage: _____%
6. Church, Government Entity, Nonprofit School, or Nonprofit Hospital (Circle type of organization)
7. Nonprofit Internal Revenue Code Section 501(c)(3) or 501(c)(4) Exempt Organization (must provide IRS authorized letter with this form)
8. Nonprofit Organization with an authorized letter issued by the Michigan Department of Treasury prior to June 1994 (must provide copy of letter with this form)
9. Rolling Stock purchased by an Interstate Motor Carrier
10. Other (explain): _____

SECTION 4: CERTIFICATION

I declare, under penalty of perjury, that the information on this certificate is true, that I have consulted the statutes, administrative rules and other sources of law applicable to my exemption, and that I have exercised reasonable care in assuring that my claim of exemption is valid under Michigan law. In the event this claim is disallowed, I accept full responsibility for the payment of tax, penalty and any accrued interest, including, if necessary, reimbursement to the vendor for tax and accrued interest.

Type of Business (see codes on page 2) 15	Business Name Research Triangle Institute
Business Address 3040 E. Cornwallis Road	City, State, ZIP Code Research Triangle Park, Durham, NC 27709
Business Telephone Number (include area code) (919) 541-6000	Name (Print or Type) Alonzo Cole, Jr.
Signature and Title <i>Alonzo Cole, Jr.</i> / Tax Manager	Date Signed 01/01/2024

Invoices and receipts must show exempt organization as purchaser.

State of New Jersey
DIVISION OF TAXATION
SALES AND USE TAX

Read instructions on bottom of form

* EXEMPT ORGANIZATION CERTIFICATE *
FORM ST-5

ISSUED BY: RESEARCH TRIANGLE INSTITUTE INC
3040 CORNWALLIS ROAD
RESEARCH TRIANGLE PARK NC 27709-219

EXEMPT ORGANIZATION NUMBER 560-686-338/000
Effective Date: 05/07/01
Date Issued: 08/07/10

Transaction Date: _____

TO _____
(Name of Vendor)

The undersigned certifies: that the Division of Taxation has determined this organization is exempt from New Jersey Sales and Use Tax for this transaction; and this purchase is directly related to the purposes for which this organization was formed and is being purchased with the organization's funds.

Description of purchase:


ACTING DIRECTOR
DIVISION OF TAXATION

(Signature of Officer or Trustee of the organization)

Name and Title of Officer (Please Print)

INSTRUCTIONS FOR EXEMPT ORGANIZATION: Form ST-5 is valid for exemption from sales and use tax on all purchases (except energy and utility service), if the purchase is directly related to the organization's purposes and made with organization (not personal) funds. Retain the original ST-5 (unsigned) in files, make copies and complete and sign them for vendors. Notify the Division of changes in organization name, address or exempt status.

INSTRUCTIONS FOR VENDORS (AND EXEMPT ORGANIZATIONS):

- (a) The ST-5 exempt organization certificate must be an official certificate having the signature of a Director of the Division of Taxation (or a photocopy of the certificate) and must have the organization's name, address and exempt organization number pre-printed by the Division on the upper portion of the certificate, with no apparent alterations.
- (b) The certificate must be properly completed, dated, and signed by an officer of the organization.
- (c) For motel/hotel occupancies, this exemption applies to sales tax, but not the state 'occupancy fee', the 'municipal occupancy tax', or the Atlantic City luxury tax.

Bills or receipts must show the exempt organization as the purchaser. Payment must be from the funds of the exempt organization. Certificates must be retained by the vendor for a period of not less than four years from the date of the last sale covered by the certificate. Subordinate or affiliated organizations may not use the exemption number assigned to the parent organization.

Additional Purchases - This certificate covers additional similar purchases by the same organization. Each sales slip or invoice must show the organization's name and exempt organization number.

ST-5A PERMIT - This Exempt Organization Certificate (ST-5) also serves as an Exempt Organization Permit (ST5A) for the organization to which the certificate is issued.



**Exempt Organization
Exempt Purchase Certificate**

Single purchase certificate

Blanket certificate

Your exempt organization number
is not your federal employer
identification number (see instructions).

Exempt organization number (6-digit number
issued by the New York State Tax Department)

EX - 2 | 3 | 2 | 0 | 4 | 4

Name of seller			Name of exempt organization/purchaser		
Street address			Street address		
City	State	ZIP code	City	State	ZIP code
			RTP	NC	27709

The exempt organization must be the direct purchaser and payer of record.

You may not use this form to purchase motor fuel or diesel motor fuel exempt from tax.

Representatives of governmental agencies or diplomatic missions may not use this form.

Carefully read the instructions and other information on the back of this document.

I certify that the organization named above holds a valid Form ST-119, *Exempt Organization Certificate*, and is exempt from New York State and local sales and use taxes on its purchases.

I also certify that the above statements are true and correct. I make these statements with the knowledge that knowingly making a false or fraudulent statement on this document is a misdemeanor under section 1817 of the New York State Tax Law and section 210.45 of the Penal Law, punishable by imprisonment for up to a year and a fine of up to \$10,000 for an individual or \$20,000 for a corporation. I understand that the Tax Department is authorized to investigate the validity of the exemption claimed or the accuracy of any information entered on this form.

Print or type name of officer of organization <i>C. Steven Cornwell</i>	Title <i>Director of Accounting</i>
Signature of officer of organization <i>C. Steven Cornwell</i>	Date issued <i>1/6/2011</i>

Need help?



Internet access: www.nystax.gov
(for information, forms, and publications)



Fax-on-demand forms: Forms are
available 24 hours a day,
7 days a week. 1 800 748-3676



Telephone assistance is available from 8:00 A.M. to
5:00 P.M. (eastern time), Monday through Friday.

Sales Tax Information Center: (518) 485-2889
For in-state callers without free
long distance: 1 800 698-2909

To order forms and publications: (518) 457-5431
For in-state callers without free
long distance: 1 800 462-8100



Text Telephone (TTY) Hotline (for persons with
hearing and speech disabilities using a TTY): If you
have access to a TTY, contact us at 1 800 634-2110.
If you do not own a TTY, check with independent
living centers or community action programs to find
out where machines are available for public use.



Persons with disabilities: In compliance with the
Americans with Disabilities Act, we will ensure that
our lobbies, offices, meeting rooms, and other facilities
are accessible to persons with disabilities. If you have
questions about special accommodations for persons
with disabilities, call the information center.



Commonwealth of Virginia
 Department of Taxation
www.tax.virginia.gov/nonprofit

Retail Sales and Use Tax Certificate of Exemption

Research Triangle Institute
 3040 Cornwallis Road
 Research Triangle Park, NC 27709

Issued Date: 03/12/2024
 Expiration Date: 03/12/2029
 Exemption Number: SE560686338F03122029

This letter confirms that your organization qualifies under *Code of Virginia* § 58.1-609.11 to purchase tangible personal property without paying the Virginia sales and use tax. The exemption also applies to purchases of meals, prepared food and catering by the organization for its use or consumption on or after April 22, 2016. The exemption is not applicable to the purchase of taxable services, such as hotel and motel accommodations.

To purchase tangible personal property without paying Virginia sales and use tax:

- Present a copy of this letter to each dealer.
- Pay directly from the organization’s funds (i.e., debit card, credit card or checking account). Purchases by a member of the organization from his personal funds (i.e., cash, personal credit card or personal checking account) are taxable even though they may be reimbursed by the organization. If the organization issues credit cards to employees who are responsible for payment of the charges that are reimbursed by the organization, these types of transactions are taxable.
- Employees or members may NOT use this exemption certificate to purchase goods for personal use.
- The organization must establish: 1) that the provision of meals, prepared food and catering to individuals furthers an official function, mission, service or purpose of the nonprofit organization; and 2) that the organization has determined to whom, when, and how the meals or food are served or consumed.

Dealers, please note the following:

- The dealer is required to have a valid certificate of exemption from each organization on file.

I certify that the item(s) being purchased will be used or consumed by the organization named above and that payment for this purchase is made to the vendor from the organization’s funds.

Organization’s Authorized Representative: <u>Alonzo Cole</u> Printed Name: <u>Alonzo Cole</u>
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Any misuse of exemption certificates will be subject to the penalties prescribed in § 58.1-623.1 of the *Code of Virginia*.