

## Accounting Welcome Packet

Thank you for choosing Innovative Driven as your trusted partner through the information lifecycle!

To provide a seamless onboarding experience, we've provided answers to commonly asked accounting questions and accounting forms below.

Our invoices are sent via email by our accounting system. To ensure your receipt, please ask your IT department to whitelist our AR email address and domain [accounts.receivable@innovativedriven.com](mailto:accounts.receivable@innovativedriven.com)

All statement requests and remittance advices should be directed to [collections@innovativedriven.com](mailto:collections@innovativedriven.com)

If you have any questions or need assistance, our accounting team is here to help! We can be reached by email at [accounts.receivable@innovativedriven.com](mailto:accounts.receivable@innovativedriven.com) or by phone at 703-875-8003. Our business hours are 9am to 6pm Eastern, Monday through Friday.

### Innovative Driven - Company Information

<b>Legal Name:</b>	Innovative Discovery, LLC
<b>D/B/A Name:</b>	Innovative Driven
<b>Type of Business:</b>	Limited Liability Company (LLC)
<b>LLC Classification:</b>	P - Partnership
<b>EIN/VAT/Tax ID:</b>	82-1628805
<b>Business Size:</b>	Large Business
<b>Business Exemptions:</b>	Non-Exempt
<b>Dun &amp; Bradstreet (DUNS) Number:</b>	608378944
<b>UEI Number:</b>	Q92GAXVTQXN1
<b>Primary NAICS Code:</b>	518210
<b>Certifications and Compliance:</b>	ISO 27001: Risk Management ISO 27701: Privacy ISO 27017: Cloud ISO 9001: Quality Management SOC 2 Type 2: Focuses on non-financial reporting controls as they relate to the security, availability, processing integrity, confidentiality, and privacy of a system. FedRAMP Authorized StateRAMP Authorized Compliant with many other industry regulations and certifications, like: PCI/DSS, HIPPA, etc.

<b>Address 1:</b>	1700 North Moore Street
<b>Address 2:</b>	Suite 1500
<b>City, State, Postal Code:</b>	Arlington, Virginia 22209
<b>Country:</b>	USA
<b>Telephone No:</b>	+1 703-875-8003
<b>Web Address:</b>	<a href="http://www.innovatedriven.com">www.innovatedriven.com</a>

<b>Vendor Type:</b>	Technology & Legal Service Provider
<b>Headquarters Location:</b>	Virginia, USA
<b>Types of Services Provided:</b>	We provide creative solutions and consultative services to law firms, corporations and government agencies. Our services include eDiscovery, Information Governance, Data Management, Digital Forensics, Software Solutions, Consultation and Talent Acquisition.
<b>Licensure:</b>	We are licensed to conduct business in all 50 states, US territories and internationally

## Innovative Driven - Payment information

EFT - ACH/Wire (Preferred)	
<b>Bank Name:</b>	Wells Fargo, N.A.
<b>Beneficiary Account Name:</b>	Innovative Discovery, LLC.
<b>Account Number:</b>	4888240363
<b>ABA Routing Number:</b>	121000248
<b>SWIFT ID:</b>	WFBIUS6S
<b>Invoice Currency:</b>	US Dollars (USD)
<b>Branch Address:</b>	420 Montgomery
<b>City, State, Postal Code:</b>	San Francisco, CA 94104
<b>Remittance Email:</b>	<a href="mailto:collections@innovatedriven.com">collections@innovatedriven.com</a>

Standard Check Payments	
<b>Mailing Address:</b>	Innovative Discovery, LLC. PO Box 780154
<b>City, State, Postal Code:</b>	Philadelphia, PA 19178-0154
<b>Remittance Email:</b>	<a href="mailto:collections@innovatedriven.com">collections@innovatedriven.com</a>

### Overnight Check Payments

<b>Mailing Address:</b>	Lockbox Services 780154 Innovative Discovery, LLC. MAC Y1372-045 401 Market Street
<b>City, State, Postal Code:</b>	Philadelphia, PA 19106
<b>Remittance Email:</b>	<a href="mailto:collections@innovatedriven.com">collections@innovatedriven.com</a>

### Credit Card Payments

We accept Visa, Mastercard, Discovery and American Express. Credit card payments can only be accepted through our self-service portal and the payment link can be found at the bottom of your invoice.

All credit card payments are subject to a processing fee.

Innovative Driven is registered with a range of eBilling solutions to provide seamless invoice delivery. If your ePortal is not listed below, please reach out to our AR team [accounts.receivable@innovatedriven.com](mailto:accounts.receivable@innovatedriven.com) and we will be happy to get our company registered.

### Innovative Driven - Registered ePortals

<b>ePortal Name:</b>	<b>Primary Email Address for Onboarding:</b>
Ariba	<a href="mailto:accounts.receivable@innovatedriven.com">accounts.receivable@innovatedriven.com</a>
Ascent	<a href="mailto:accounts.receivable@innovatedriven.com">accounts.receivable@innovatedriven.com</a>
Bill.com	<a href="mailto:Accounts.Receivable@id-edd.com">Accounts.Receivable@id-edd.com</a>
Billing Point	<a href="mailto:Accounts.Receivable@id-edd.com">Accounts.Receivable@id-edd.com</a>
Brightflag	<a href="mailto:Accounts.Receivable@id-edd.com">Accounts.Receivable@id-edd.com</a>
Collaborati	<a href="mailto:accounts.receivable@innovatedriven.com">accounts.receivable@innovatedriven.com</a>
Corporation Service Company CSC	<a href="mailto:accounts.receivable@innovatedriven.com">accounts.receivable@innovatedriven.com</a>
Corridor	<a href="mailto:bryce.young@innovatedriven.com">bryce.young@innovatedriven.com</a>
CounselGO	<a href="mailto:candice.boykin@innovatedriven.com">candice.boykin@innovatedriven.com</a>
CounselLink	<a href="mailto:matt.byrne@innovatedriven.com">matt.byrne@innovatedriven.com</a>
Coupa	<a href="mailto:Accounts.receivable@id-edd.com">Accounts.receivable@id-edd.com</a>
Delphi	<a href="mailto:candice.boykin@innovatedriven.com">candice.boykin@innovatedriven.com</a>
Euro Timetrix	<a href="mailto:vicky.lang@driven-inc.com">vicky.lang@driven-inc.com</a>
Gallagher Bassett	<a href="mailto:accounting@driven-inc.com">accounting@driven-inc.com</a>

GEP Smart	<a href="mailto:accounts.receivable@innovativedriven.com">accounts.receivable@innovativedriven.com</a>
IPP	<a href="mailto:accounts.receivable@innovativedriven.com">accounts.receivable@innovativedriven.com</a>
Jaggaer	<a href="mailto:Accounts.Receivable@id-edd.com">Accounts.Receivable@id-edd.com</a>
KBR Supplier eportal	<a href="mailto:matthew.mccann@innovativedriven.com">matthew.mccann@innovativedriven.com</a>
Lawtrac	<a href="mailto:accounts.receivable@innovativedriven.com">accounts.receivable@innovativedriven.com</a>
Legal & Labor Incoixe Portal	<a href="mailto:accounts.receivable@innovativedriven.com">accounts.receivable@innovativedriven.com</a>
Legal Tracker	<a href="mailto:accounts.receivable@innovativedriven.com">accounts.receivable@innovativedriven.com</a>
One Paper Lane	<a href="mailto:accounts.receivable@innovativedriven.com">accounts.receivable@innovativedriven.com</a>
Open Invoice	<a href="mailto:vicky.lang@innovativedriven.com">vicky.lang@innovativedriven.com</a>
Oracle Fusion	<a href="mailto:kimberly.sawalha@id-edd.com">kimberly.sawalha@id-edd.com</a>
SLICS	<a href="mailto:alissa.nelson@innovativedriven.com">alissa.nelson@innovativedriven.com</a>
Supplier Solutions	<a href="mailto:accounts.receivable@innovativedriven.com">accounts.receivable@innovativedriven.com</a>
Taulia	<a href="mailto:accounts.receivable@innovativedriven.com">accounts.receivable@innovativedriven.com</a>
Tungsten	<a href="mailto:accounts.receivable@id-edd.com">accounts.receivable@id-edd.com</a>
TyMetrix360	<a href="mailto:accounts.receivable@id-edd.com">accounts.receivable@id-edd.com</a>
VendorCafe	<a href="mailto:accounts.receivable@innovativedriven.com">accounts.receivable@innovativedriven.com</a>
Wand	<a href="mailto:alissa.nelson@innovativedriven.com">alissa.nelson@innovativedriven.com</a>
Wolter Kluwer-Collaboration Portal	<a href="mailto:accounts.receivable@innovativedriven.com">accounts.receivable@innovativedriven.com</a>

## Innovative Driven - Documents

- W-9 Form
- Voided Check
- Bank Letter

## Request for Taxpayer Identification Number and Certification

► Go to [www.irs.gov/FormW9](http://www.irs.gov/FormW9) for instructions and the latest information.

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

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. Innovative Discovery LLC	
2 Business name/disregarded entity name, if different from above Innovative Driven	
3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only <b>one</b> of the following seven boxes.  <input type="checkbox"/> Individual/sole proprietor or single-member LLC <input type="checkbox"/> C Corporation <input type="checkbox"/> S Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate <input checked="" type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ► <u>P</u> <b>Note:</b> 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 <b>not</b> 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) ►	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) _____  <small>(Applies to accounts maintained outside the U.S.)</small>
5 Address (number, street, and apt. or suite no.) See instructions. 1700 N Moore Street Suite 1500	Requester's name and address (optional)
6 City, state, and ZIP code Arlington, VA 22209	
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										
8	2			-	1	6	2	8	8	0 5

### 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 ► 	Date ► 01/03/2023
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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](http://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.*

**INNOVATIVE DISCOVERY, LLC**  
1700 N MOORE STREET, SUITE 1500  
ARLINGTON, VA 22209  
703-875-8003

**WELLS FARGO BANK, N.A.** 11-24/1210  
420 Montgomery  
San Francisco, CA

010502

PAY TO THE  
ORDER OF

\$

VOID

DOLLARS

MEMO

AUTHORIZED SIGNATURE

MP

⑈010502⑈ ⑆121000248⑆

4888240363⑈

ENDORSE HERE

VOID

DO NOT WRITE, STAMP OR SIGN BELOW THIS LINE  
RESERVED FOR FINANCIAL INSTITUTION USE \*

ORIGINAL  
DOCUMENT

 The security features listed below, as well as those not listed, exceed industry guidelines.

**Security Features:**

Microprint Line

Security Screen

**Results of document attention:**

• Small type in line appears as dotted line when photocopied

• Absence of "Original Document" verbiage on back of check

\*FEDERAL RESERVE BOARD OF GOVERNORS REG. CC





Saad Ahmed  
Business Relationship Support  
Specialist

Middle Market Banking  
MAC 3076-062  
1753 Pinnacle Drive  
McLean, VA 22102  
Work: 571-341-2904

April 8, 2022

Attn: Alissa Nelson  
Innovative Discovery, LLC  
1700 N MOORE ST STE 1500  
Arlington, VA 22209

To Whom It May Concern:

Please accept this letter as verification of account information required by your vendor. This information can be used in lieu of a voided check.

Account Name:	Innovative Discovery, LLC
Account Number:	4888240363
Wire Routing Number:	121000248
ACH Routing Number:	121000248
Bank Name:	Wells Fargo Bank, N.A.
Bank Address:	420 Montgomery Street San Francisco, CA 94104

Sincerely,

Saad Ahmed  
Business Relationship Support Specialist  
Middle Market Banking



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