

Information:

Drawer: Accounts Payable - Invoices  
Vendor Number: 1591334  
Vendor Name: Watermark Insights LLC  
Invoice Number: SI-00008704  
Invoice Date: 2/10/2023  
PO Number: P0005887  
Check Number: 0309443  
Check Amount: \$ 28,404.00  
Check Date: 03/03/2023  
Voucher Number: V0776014  
Document Type: AP Invoice

Document Below

# INVOICE



Watermark Insights  
P.O. Box 736632  
Dallas, TX 75373-6632

Date	10-Feb-2023
Invoice #	SI-00008704
Terms	Net 60
Date Due	11-Apr-2023
PO#	

**Bill To:**

College of DuPage  
Accounts Payable  
425 Fawell Blvd. L  
Glen Ellyn, Illinois 60137

**Ship To:**

College of DuPage  
Accounts Payable  
425 Fawell Blvd. L  
Glen Ellyn, Illinois 60137

DESCRIPTION	QUANTITY	RATE	AMOUNT
Watermark Course Evaluations and Surveys  License Term: 02/28/2023 - 02/27/2024	1	\$28,404	\$28,404.00
SUBTOTAL			\$28,404.00
Tax@0%			\$0.00
TOTAL			\$28,404.00
TOTAL PAID			\$0.00
AMOUNT DUE			\$28,404.00

**Thank you for your business!**

Invoices not paid within 30 days of the invoice due date may be charged a late fee of 1% per month.

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**Please note that our remittance information has changed.**

**ACH Information:**

Beneficiary: Watermark Insights, LLC  
Beneficiary's Bank: JPMorgan Chase  
Routing Number: 021000021  
Account Number: 762888656

**Bank Address:**

270 Park Avenue  
43rd Floor  
New York, NY 10017  
United States

**Please remit checks to :**

Watermark Insights LLC  
P.O. Box 736632  
Dallas, TX 75373-6632

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"Watermark's software gives higher education institutions the insights they need to improve, evolve, and empower student success. Contact [ar@watermarkinsights.com](mailto:ar@watermarkinsights.com) for questions about this invoice; contact [support@watermarkinsights.com](mailto:support@watermarkinsights.com) for product and technical support. Please send tax-exempt certificates to [taxes@watermarkinsights.com](mailto:taxes@watermarkinsights.com)."

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“Watermark’s software gives higher education institutions the insights they need to improve, evolve, and empower student success. Contact [ar@watermarkinsights.com](mailto:ar@watermarkinsights.com) for questions about this invoice; contact [support@watermarkinsights.com](mailto:support@watermarkinsights.com) for product and technical support. Please send tax-exempt certificates to [taxes@watermarkinsights.com](mailto:taxes@watermarkinsights.com).”



### Watermark Completes Acquisition of Aviso



On December 22, 2021, Watermark completed its acquisition of Aviso Coaching, LLC dba Aviso Retention ("Aviso"), a leader in higher education solutions that focus on driving student retention, utilizing student coaching, software support, and predictive analytics. Watermark and Aviso are excited for this step forward in their collected vision to support colleges and universities.

Aviso CEO Alexander Leader will continue to support Watermark and Aviso's collective strategy as Chief Impact Officer. Additionally, the services provided to you will continue to be offered by the new organization. While you may encounter a few more Watermark employees, you will continue to work with the Aviso employees, all offered roles at Watermark.

**Disclaimer:** This communication may contain forward-looking statements relating to expectations, plans, and prospects including expectations relating to the benefits that will be derived from this transaction. These forward-looking statements are based upon the current expectations and beliefs of Watermark's management as of the date of this release, and are subject to certain risks and uncertainties that could cause actual results to differ materially from those described in the forward-looking statements including, without limitation, risks related to: Watermark's ability to successfully integrate Aviso and its recently-acquired business, the effect of the transaction on the ability of Watermark or Aviso to retain key personnel and maintain relationships with customers, suppliers and others, the outcome of any legal proceeding related to the transaction and competitive pressures in the markets in which Watermark and Aviso operate. All forward-looking statements are based on information available to the Company as of the date hereof, and Watermark disclaims any obligation to update these forward-looking statements.

### Updated product names

This letter confirms that on July 14, 2021, Watermark Insights, LLC ("Watermark") introduced new product names. Watermark is the sole holder of intellectual property rights on these products.

Old Name	New Name	No change
Aqua by Watermark	Outcomes Assessment Projects	Watermark Planning & Self-Study
Digital Measures by Watermark	Faculty Success	LiveText by Watermark
Activity Insight	Faculty Accomplishments	Taskstream AMS by Watermark
Workflow	Review, Promotion & Tenure	Taskstream LAT by Watermark
Web Profiles	Web Profiles	Tk20 by Watermark
EvaluationKIT by Watermark	Course Evaluations & Surveys	
SmartCatalog by Watermark	Curriculum Strategy	
Via by Watermark	Student Learning & Licensure	
Aviso Enterprise	Student Success & Engagement	

Watermark products are distributed only through Watermark and can only be purchased directly from Watermark. Watermark products provide a unique combination of client-specific implementation design, outcomes assessment, accreditation planning, custom reporting, survey tools, rubric building, faculty activity reporting, course evaluations, curriculum and syllabus management, training, services, and support. Direct any questions regarding intellectual property rights in Watermark products or their distribution to [support@watermarkinsights.com](mailto:support@watermarkinsights.com).

Form (Rev. October 2018) Department of the Treasury Internal Revenue Service	<h2 style="margin: 0;">Request for Taxpayer Identification Number and Certification</h2> <p style="margin: 0;">▶ Go to <a href="http://www.irs.gov/FormW9">www.irs.gov/FormW9</a> for instructions and the latest information.</p>	Give Form to the requester. Do not send to the IRS.																		
<div style="display: flex; justify-content: space-between;"> <div style="width: 60%;"> <p>1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank. <b>Watermark Insights, LLC</b></p> <p>2 Business name/disregarded entity name, if different from above</p> </div> <div style="width: 35%;"> <p>4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):</p> <p>Exempt payee code (if any) _____</p> <p>Exemption from FATCA reporting code (if any) _____</p> <p><small>(Applies to accounts maintained outside the U.S.)</small></p> </div> </div>																				
Print or type. See Specific Instructions on page 3.	<p>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.</p> <div style="display: flex; justify-content: space-between;"> <div style="width: 60%;"> <p><input type="checkbox"/> Individual/sole proprietor or single-member LLC</p> <p><input checked="" type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ▶ _____</p> <p><small>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.</small></p> <p><input type="checkbox"/> Other (see instructions) ▶ _____</p> </div> <div style="width: 35%;"> <p><input type="checkbox"/> C Corporation    <input type="checkbox"/> S Corporation    <input type="checkbox"/> Partnership    <input type="checkbox"/> Trust/estate</p> </div> </div>																			
	<p>5 Address (number, street, and apt. or suite no.) See instructions. <b>10900 Stonelake Blvd, Suite B-350</b></p> <p>6 City, state, and ZIP code <b>Austin, TX 78759</b></p> <p>7 List account number(s) here (optional): <b>Remittance Address: P.O. Box 736632, Dallas, TX 75373-6632</b></p>																			
<h3>Part I Taxpayer Identification Number (TIN)</h3> <p>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 <i>How to get a TIN</i>, later.</p> <p><b>Note:</b> If the account is in more than one name, see the instructions for line 1. Also see <i>What Name and Number To Give the Requester</i> for guidelines on whose number to enter.</p>																				
<div style="display: flex; justify-content: space-between;"> <div style="width: 60%;"> <p>Social security number</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 10%; height: 20px;"></td> <td style="width: 10%; height: 20px;"></td> <td style="width: 10%; height: 20px;"></td> <td style="width: 10%; height: 20px;"></td> <td style="width: 10%; height: 20px;"></td> <td style="width: 10%; height: 20px;"></td> <td style="width: 10%; height: 20px;"></td> <td style="width: 10%; height: 20px;"></td> </tr> </table> <p>or</p> <p>Employer identification number</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 10%; height: 20px;">1</td> <td style="width: 10%; height: 20px;">3</td> <td style="width: 10%; height: 20px;">-</td> <td style="width: 10%; height: 20px;">4</td> <td style="width: 10%; height: 20px;">0</td> <td style="width: 10%; height: 20px;">9</td> <td style="width: 10%; height: 20px;">2</td> <td style="width: 10%; height: 20px;">7</td> <td style="width: 10%; height: 20px;">4</td> <td style="width: 10%; height: 20px;">3</td> </tr> </table> </div> <div style="width: 35%;"> <p>Requester's name and address (optional)</p> </div> </div>											1	3	-	4	0	9	2	7	4	3
1	3	-	4	0	9	2	7	4	3											
<h3>Part II Certification</h3> <p>Under penalties of perjury, I certify that:</p> <ol style="list-style-type: none"> <li>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</li> <li>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</li> <li>I am a U.S. citizen or other U.S. person (defined below); and</li> <li>The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.</li> </ol> <p><b>Certification instructions.</b> 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.</p>																				
<div style="display: flex; justify-content: space-between;"> <div style="width: 60%;"> <p><b>Sign Here</b></p> <p>Signature of U.S. person ▶ <i>Matt Rhodes</i></p> </div> <div style="width: 35%;"> <p>Date ▶ <b>10/24/2022</b></p> </div> </div>																				
<h3>General Instructions</h3> <p>Section references are to the Internal Revenue Code unless otherwise noted.</p> <p><b>Future developments.</b> For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to <a href="http://www.irs.gov/FormW9">www.irs.gov/FormW9</a>.</p> <p><b>Purpose of Form</b></p> <p>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:</p> <ul style="list-style-type: none"> <li>• Form 1099-DIV (dividends, including those from stocks or mutual funds)</li> <li>• Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)</li> <li>• Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)</li> <li>• Form 1099-S (proceeds from real estate transactions)</li> <li>• Form 1099-K (merchant card and third party network transactions)</li> <li>• Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)</li> <li>• Form 1099-C (canceled debt)</li> <li>• Form 1099-A (acquisition or abandonment of secured property)</li> </ul> <p>Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.</p> <p>If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See <i>What is backup withholding</i>, later.</p>																				



[External] Customer ID C-1065, Watermark Invoice No. 'SI-00008704', College of DuPage

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Watermark Accounting Team <ar@watermarkinsights.com>

Fri, Feb 10, 2023 at 07:04 PM UTC

CC:

BCC:

CAUTION: This email originated from outside of COD's system. Do not click links, open attachments, or respond with sensitive information unless you recognize the sender and know the content is safe.

Dear Valued Customer,

We are delighted to provide Watermark's systems to support the educational initiatives of College of DuPage.

Your invoice is attached. Please do not hesitate to email ar@watermarkinsights.com regarding any questions you may have concerning this invoice. You may also contact support@watermarkinsights.com regarding any questions you may have concerning product or technical support. Watermark's mission is to put better data into the hands of administrators, faculty, and students everywhere in order to empower them to make meaningful improvements.

Invoices not paid within 30 days of the invoice due date may be charged a late fee of 1% per month.

Warm regards,  
The Watermark Accounting Team

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**2 attachments**

Contract Invoice-SI-00008704.pdf

Email Logo