



Montrio Belton
LAW OFFICES OF MONTRIO BELTON, LLC

TRUST REQUEST

Trust Request # 1011
Date: 04/11/2022
Due Upon Receipt

Law Office of Montrio Belton

PO Box 566
Rock Hill, SC 29731

School District 5 of Richland and Lexington Counties

Outstanding Trust Request

Date	Notes	Total
04/11/2022	Outstanding Invoice	\$2,155.32
		Total \$3,155.32

Please make all amounts payable to: Law Office of Montrio Belton

100.231.3190000.0000.010



INVOICE

Invoice # 942
Date: 02/28/2022
Due Upon Receipt

Law Office of Montrio Belton

PO Box 566
Rock Hill, SC 29731
United States

Andrea E. White
White & Story, LLC
3614 Landmark Drive, Ste EF
Columbia, South Carolina 29204

21-00192(White, Andrea)

Lexington-Richland School District-5 v. Steve Hefner-Interim Superintendent

Type	Date	Notes	Quantity	Rate	Total
Service	11/05/2021	Legal Research: Researched law re: interference w/ Contractual Relationship	0.50	\$200.00	\$150.00
Expense	11/08/2021	Common Pleas Filing Fee: Filing fee for Lexington 5 vs. Steve Hefner	1.00	\$180.32	\$180.32
Service	11/08/2021	Civil Case Review: Reviewed Summons sent by Andrea White	0.30	\$300.00	\$90.00
Service	11/08/2021	Filing documents in Clerks office: Filed Summons and Complaints	0.30	\$300.00	\$90.00
Service	11/15/2021	Email Correspondence: Sent an email to Private Investigator for confirmation of Process Service.	0.20	\$100.00	\$20.00
Service	11/30/2021	Read/Send Email or Text: Sent Email	0.20	\$100.00	\$20.00
Expense	12/02/2021	Served Subpoenas: AJS Investigations Vendor Invoice# 5971 Date:11/29/2021 - Served Subpoena on Dr, Stephen Hefner - Cover Letter, Summons & Complaint.	1.00	\$95.00	\$95.00
Service	12/21/2021	Drafted Cover Letter: Drafted Cover Letter and prepared Affidavit of Service mail to Clerk of Court in Lexington County SC.	0.40	\$100.00	\$40.00
Service	12/21/2021	Traveled to the Post Office: Traveled to the Post Office to mail documents pertaining to matter.	0.30	\$100.00	\$30.00

Service	01/11/2022	Reviewed Document(s): Pulled Answer/Counterclaim for Attny Belton (1) Filed- Defendant Hefner's Answer and Counter Claim (2) Filed- Defendant Hefner's Motion to Dismiss	0.40	\$100.00	\$40.00
Service	02/15/2022	Drafting: Researched/Drafted Answer Counterclaim	5.10	\$300.00	\$1,530.00
Service	02/16/2022	Telephone Call: Telephone call with District's General Counsel, Andrea White.	0.40	\$300.00	\$120.00
Service	02/25/2022	Telephone Call: Telephone call with Molly Flynn discussing lawsuit and my view of the law and 2/28 Board meeting	0.30	\$300.00	\$90.00
Service	02/28/2022	Telephone Call: Telephone call with Attorney Billie McGee discussing case and answer to counterclaim.	0.20	\$300.00	\$60.00
Service	02/28/2022	Drafting: Drafted letter to Board of Trustees. Sent via email.	2.00	\$300.00	\$600.00
				Total	\$3,155.32

Detailed Statement of Account

Current Invoice

Invoice Number	Due On	Amount Due	Payments Received	Balance Due
942	02/28/2022	\$3,155.32	\$0.00	\$3,155.32
Outstanding Balance				\$3,155.32
Total Amount Outstanding				\$3,155.32

Please make all amounts payable to: Law Office of Montrie Belton

Payment is due upon receipt.

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.

Law Offices of Montrie Belton, LLC

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.

- ☐ Individual/sole proprietor or single-member LLC
- ☐ Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ► _____
- ☐ Other (see instructions) ► _____
- ☐ C Corporation
- ☒ S Corporation
- ☐ Partnership
- ☐ Trust/estate
- 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.

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) _____

(Applies to accounts maintained outside the U.S.)

5 Address (number, street, and apt. or suite no.) See instructions.

511 Saluda Street, PO BOX 566

6 City, state, and ZIP code

Rock Hill, SC 29731

7 List account number(s) here (optional)

Requester's name and address (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

____ - ____ - ____ - ____ - ____

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 ►

7 March 2022

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.