



# Limited Engagement Agreement

## U.S. Persons

Today's Date:
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A Limited Engagement Fee is a payment to an individual (non-employee, non-student) for providing a service of an academic nature, short duration, and/or low dollar amount (\$1,000 or less per transaction; \$5,000 per calendar year max). This is intended for guest speakers, guest lecturers, artists, performers, writers/editors, board members, critics, preceptors, and mentors or those services meeting the fee guidelines. It is not designed for engagements that create a material risk of physical injury or property damage. For these high-risk engagements requiring insurance, the Independent Contractor Agreement form should be used.

### Service Provider Information

Name of Individual	
Address (street, apt. or suite no., or rural route).	
City, State and Zip Code	
Email	Phone Number

This agreement is made by and between the Trustees of the University of Pennsylvania, a Pennsylvania tax exempt educational corporation ("University"), and \_\_\_\_\_ ("Individual"), and is effective as of this day of \_\_\_\_\_.

The parties agree as follows:

- 1. ENGAGEMENT:** Individual will provide a service on: \_\_\_\_\_ date(s)
- 2. DESCRIPTION OF SERVICES:**
- 3. LOCATION OF SERVICES:**
- 4. PAYMENT/TAXES:** University will pay Individual the sum of \$ \_\_\_\_\_ in U.S. dollars based upon applicable payment terms. **Effective January 1, 2018, the University is required to withhold Pennsylvania state tax on payments to individuals who are non-Pennsylvania residents and who are performing services in Pennsylvania. The University will comply with all U.S. federal, state, or local withholding requirements on income or other payroll taxes on behalf of the individual.** All travel expenses must be included on the invoice and should be billed as a separate line item. The University will issue an IRS 1099-NEC for all payments of \$600 or more withing a calendar year.
- 5. SERVICE PROVIDER:** Individual will be participating in the Engagement as a service provider and not as an employee or agent of University.
- 6. SERVICE PROVIDER** attests they are not an enrolled student or an employee of the Trustees of the University of Pennsylvania, including the Health System or any subsidiaries.

IN WITNESS WHEREOF, the parties hereto have caused this Agreement to be duly executed by their respective authorized representatives as of the date first set forth above.

**Signatures**

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Service Provider

Print Name	
Date	Signature

Compliance Specialist Approval for the Trustees of the University of Pennsylvania

Print Name	Title
Date	Signature