

Filling Out A IRS W-9 Form

Name - This is the name of the individual completing the form.
It should be the name on your individual tax return.

Line 3. Federal tax classification If you are filling the form out for yourself check the "Individual" box, if further clarity required seek professional tax advice

Line 5 & 6 – Client to enter residential address as appears on our account records or application form

Line 7 - is optional.

Form (Rev. December 2014) Department of the Treasury Internal Revenue Service	W-9	Request for Taxpayer Identification Number and Certification	Give Form to the requester. Do not send to the IRS.																																													
1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.																																																
2 Business name/disregarded entity name, if different from above																																																
3 Check appropriate box for federal tax classification; check only one 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 type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=partnership) ▶ _____ Note. For a single-member LLC that is disregarded, do not check LLC; check the appropriate box in the line above for the tax classification of the single-member 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.)		Requester's name and address (optional)																																														
6 City, state, and ZIP code																																																
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 Part I instructions on page 3. 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> on page 3.																																																
<table border="1"> <tr> <td colspan="9">Social security number</td> </tr> <tr> <td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td> </tr> <tr> <td colspan="9">OR</td> </tr> <tr> <td colspan="9">Employer identification number</td> </tr> <tr> <td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td> </tr> </table>				Social security number																		OR									Employer identification number																	
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Note. If the account is in more than one name, see the instructions for line 1 and the chart on page 4 for guidelines on whose number to enter.																																																
Part II Certification																																																
Under penalties of perjury, I certify that:																																																
1. 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																																																
2. 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																																																
3. I am a U.S. citizen or other U.S. person (defined below); and																																																
4. 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 on page 3.																																																
Sign Here		Date ▶																																														
Signature of U.S. person ▶																																																

Line 2. Business name/disregarded entity name. (If applicable otherwise leave blank)

Line 4. Only complete if you have an exemption code. Generally left blank if you are an individual.

Part I. Taxpayer Identification Number (TIN)

For US resident individuals, social security number to be entered in the appropriate space.

Format 999-99-9999

For resident aliens TIN is IRS individual taxpayer ID number

Part II. Certification

Form to be signed and dated (US Format Month, Day, Year)

Who Should fill out IRS form W-9?

US Persons: An individual who is a U.S. citizen or U.S. resident alien, a partnership, corporation, company, or association created or organized in the United States or under the laws of the United States, an estate (other than a foreign estate), or a domestic trust.

This document is for reference only and should not be used in lieu of professional tax advice in relation to any specific queries.