

How to Fill Out a W-9 Form

OVERVIEW

A W-9 form, officially known as the Request for Taxpayer Identification Number and Certification, is a document the IRS uses to gather information from individuals or businesses. Here is a step-by-step guide to filling it out accurately.

Line 1: Name

Enter your full name as it appears on your tax return.

Line 2, 3b, and 4: Not applicable

This section is not applicable. Companies are not eligible for enrollment.

Line 3a: Tax Classification

Check the "Individual/sole proprietor" box.

Line 5 and 6: Address

Provide the address where you receive mail. This address must match the address in the portal.

Line 7: Account Numbers (Optional)

This section is not applicable. Companies are not eligible for enrollment.

Form W-9 (Rev. March 2024) Department of the Treasury Internal Revenue Service	Request for Taxpayer Identification Number and Certification Go to www.irs.gov/FormW9 for instructions and the latest information.	Give form to the requester. Do not send to the IRS.
Before you begin. For guidance related to the purpose of Form W-9, see <i>Purpose of Form</i> , below.		
Print or type. See Specific Instructions on page 3.	1 Name of entity/individual. An entry is required. (For a sole proprietor or disregarded entity, enter the owner's name on line 1, and enter the business/disregarded entity's name on line 2.) Your Name Here	
	2 Business name/disregarded entity name, if different from above.	
	3a Check the appropriate box for federal tax classification of the entity/individual whose name is entered on line 1. Check only one of the following seven boxes. <input checked="" type="checkbox"/> Individual/sole proprietor <input type="checkbox"/> C corporation <input type="checkbox"/> S corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate <input type="checkbox"/> LLC. Enter the tax classification (C = C corporation, S = S corporation, P = Partnership) _____ Note: Check the "LLC" box above and, in the entry space, enter the appropriate code (C, S, or P) for the tax classification of the LLC, unless it is a disregarded entity. A disregarded entity should instead 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 Foreign Account Tax Compliance Act (FATCA) reporting code (if any) _____ <i>(Applies to accounts maintained outside the United States.)</i>
	3b If on line 3a you checked "Partnership" or "Trust/estate," or checked "LLC" and entered "P" as its tax classification, and you are providing this form to a partnership, trust, or estate in which you have an ownership interest, check this box if you have any foreign partners, owners, or beneficiaries. See instructions <input type="checkbox"/>	
	5 Address (number, street, and apt. or suite no.). See instructions. 123 Front Street	Requester's name and address (optional)
	6 City, state, and ZIP code Sacramento, CA 95821	
	7 List account number(s) here (optional)	

How to Fill Out a W-9 Form (continued)

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Part I Taxpayer Identification Number (TIN)

Individuals: Enter your Social Security Number

Businesses: Enter your Employer Identification Number – not eligible.

Part II Certification

Read the certification statements carefully and sign and date the form.

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 <i>How to get a TIN</i> , later.	<table border="1"><thead><tr><th colspan="9">Social security number</th></tr></thead><tbody><tr><td>1</td><td>2</td><td>3</td><td>-</td><td>4</td><td>5</td><td>-</td><td>6</td><td>7</td><td>8</td><td>9</td></tr></tbody></table> <p>or</p> <table border="1"><thead><tr><th colspan="10">Employer identification number</th></tr></thead><tbody><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></tbody></table>	Social security number									1	2	3	-	4	5	-	6	7	8	9	Employer identification number																				
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Note: If the account is in more than one name, see the instructions for line 1. See also <i>What Name and Number To Give the Requester</i> for guidelines on whose number to enter.																																										
Part II Certification																																										
Under penalties of perjury, I certify that:																																										
<ol style="list-style-type: none">The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); andI 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; andI am a U.S. citizen or other U.S. person (defined below); andThe 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 Your Signature Here																																									
	Date January 1st, 2030																																									
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 .																																										
What's New																																										
Line 3a has been modified to clarify how a disregarded entity completes this line. An LLC that is a disregarded entity should check the appropriate box for the tax classification of its owner. Otherwise, it should check the "LLC" box and enter its appropriate tax classification.																																										
New line 3b has been added to this form. A flow-through entity is required to complete this line to indicate that it has direct or indirect foreign partners, owners, or beneficiaries when it provides the Form W-9 to another flow-through entity in which it has an ownership interest. This change is intended to provide a flow-through entity with information regarding the status of its indirect foreign partners, owners, or beneficiaries, so that it can satisfy any applicable reporting requirements. For example, a partnership that has any indirect foreign partners may be required to complete Schedules K-2 and K-3. See the Partnership Instructions for Schedules K-2 and K-3 (Form 1065).																																										
Purpose of Form																																										
An individual or entity (Form W-9 requester) who is required to file an information return with the IRS is giving you this form because they																																										
Cat. No. 10231X																																										
Form W-9 (Rev. 3-2024)																																										