



Western Region

Western Region W-9 Completion Guide

Please ensure that this form is completed precisely and accurately; if it is not, this form will be returned to you for corrections. Be sure that the information included in the NAME field exactly matches the name the IRS has associated with the given TIN/EIN/SSN. For those with a business: you may choose to be paid as an individual or as a business, but be sure to fill this form out accordingly.

Section 1: Top Section

This is the section where you will fill in your name and address.

- **Box 1:** type or write your full name as it is shown on your tax return.
- **Box 2:** type or write your business's name (if you have one and would like to be paid as a business). If you do not have a business or would like to be paid as an individual, leave this line blank.
- **Box 3:** check the box that describes you or the legal status of your business.
 - If you are filling the form out for yourself, and you are not being contracted through a company that you own or work for, check the "Individual" box.
- **Box 4:** only complete if you have an exemption code (leave blank if you are an individual).
- **Box 5:** type or write your street address (use the address that you would use on your tax return). *For example, if you are a sole proprietor who rents office space, but you file your tax return using your home address, enter your home address on the W-9 form so the IRS won't have trouble matching your 1099s with your 1040.*
- **Box 6:** type or write your city, state, and zip code.
- **Box 7:** Optional. Fill in this section if you have an account number that your employer will need.

Part I: Taxpayer Identification Number (TIN)

Fill in your social security number, taxpayer identification number, or employer identification number (DO NOT enter in more than one; only one box should be completed). Fill in the section that applies to you only.

- If you are an individual, type or write your SSN in the appropriate space.
- If you are a resident alien, sole proprietor, or disregarded entity, type or write your TIN.
- For all other entities, you will need to fill in your Employer Identification Number.
 - If you have a TIN/EIN/SSN but cannot remember it, you can call the IRS at (800) 829-1040 or the Social Security Administration at (800) 772-1213.
- *Make sure that you have not entered in more than one number in this section.*

Part II: Certification

Sign and date the form in Part II. Before your sign and date the form, please make sure that you read over the completed form and check to see that everything is correct. Read through the "Certification" information in Part II as well, so that you know what you are signing off on. Only sign if everything is accurate. If everything is correct, and you have finished reading the certification information, sign your legal name and include the date.

- By signing Part II of the W-9, you are stating that:
 - the TIN you provided is correct
 - you are not required to have 28% of your income withheld for tax purposes
 - you are either a US citizen, resident alien, or business entity registered or recognized in the US, or a legal non-business entity recognized in the US
 - you have provided correct information regarding your FATCA (Foreign Accounts Tax Compliance Act) requirements.
- *If you sign and one or more of these statements is false, you could face criminal charges, including perjury.*

Return the Form

Please scan and e-mail or fax the completed form to our administrator, Kristina Booker: Kristina.Booker@kpchr.org or (503) 528-3994.