Below are some TIPS that might be helpful in filling out your W-9 and should not be taken as tax advice.  If you have tax questions please consult your tax advisor or the IRS.

Tips:

* The name on line 1 must match the FEIN/SSN that is on file with the IRS.  This is the name the taxes are filed under.  If you are an individual and using your SSN line 1 must be your legal name as it appears in the IRS records.  We use the IRS TIN matching system for all verifications.  Line 1 is the only line used to run a TIN match, Line 2 is not used for matching. The TIN match does not tell us what is wrong it only tells us if it is or isn’t a match.
* If you are using an SSN then only the name that matches the SSN can be on line 1, you cannot put 2 individual names on line one if you are using an SSN as the IRS only issues an SSN to an individual person.
* Part 1 on the W-9 is where you enter your ID#, if you are using an SSN then place the number in the boxes for the SSN (Social Security Number), if you are using a FEIN (Federal Employer Identification Number) then place the numbers in the box for the Employer Identification box.  The number must be in the correct box.  You cannot use both on a W-9.
* DBA names or additional company names known by and disregarded entities can go on line 2 (please refer to IRS website for additional instructions).
* All sections of the W-9 must be filled out.  In section 3 if your company is a LLC and you mark that box the line at the end of the field must be completed.  Please make sure you mark the correct box.  If you are a nonprofit you can mark the "other" box and write in the type.  There are types that you can use under other but they are not common and you should consult your tax preparer or accountant.
* You cannot use both a SSN and a FEIN, there must only be one on the W-9.  The W-9 is used to report income.
* Double check your SSN or FEIN, SSN's must have 9 numbers, FEIN's must also have 9 numbers not counting the dashes.
* You must use the most current form, at this time it is dated 2024.  Form must be signed and dated. Date must not be more than 1 year old.
* If the FEIN is newly issued it may not be in the IRS database yet, please submit the IRS determination letter that was sent to you assigning the FEIN.
* If in doubt as to what legal name to use on line 1, refer to the IRS assignment letter you received when you applied for your FEIN, it will show the FEIN and the correct legal name.

Link to newest W-9: <https://www.irs.gov/pub/irs-pdf/fw9.pdf>

Link to video How to fill out a W-9: <https://www.irsvideos.gov/Individual/Resources/HowToCompleteFormW-9>