

How to Fill out a W-9?

* ADAI is not providing tax advice, we are providing this general information as a guide to assist applicants with submitting a W-9. Applicants are encouraged to contact their tax professional if they have questions related to a W-9 or need assistance completing the form.

1. Print your name or business name in the space where it says “Name.” The name must match the name shown on your tax returns
2. Check the box for “Individual/Sole proprietor” if you have not filed your taxes as a corporation, partnership or LLC
3. If you are using a DBA, enter it on line 2.
4. Check the box for “Exempt payee” only if you are positive that you are exempt from backup withholding. The qualifications appear on the form under “Specific Instructions, Exempt Payee”
5. Enter your current address in the space provided
6. Enter your Social Security number in the space provided. This is your taxpayer identification number (TIN)
7. Then sign and date the W-9 form. When you’re finished, provide the form to company or individual who issued it. Do not send the W-9 to the IRS

How Do You Fill out a W-9 Form for an LLC?

SINGLE-MEMBER LLC

1. A single-member Limited Liability Company is considered a disregarded entity by the Internal Revenue Service for federal income tax purposes. In this case, the sole member of an LLC must file taxes in the same way that sole proprietors do.
2. Enter your name and the legal name of your limited liability company (LLC) on the first two lines of the W-9. On the first line, write the name you file your tax returns under and on the second line, enter the legal name of the LLC
3. Enter business address, city, state and zip code
4. Check the “Individual/sole proprietor/single member LLC” box – not the “limited liability company” box for your tax classification
5. Enter your Social Security number. Most single member LLCs will use your SSN. However, the IRS allows you to enter an employee identification number (EIN) that you’ve obtained in your capacity as a sole proprietor. You cannot put both numbers on the W9 you submit. You must choose to use your SSN or EIN if you have an EIN. Whichever number you use on the W9 must match the number you use on the application.
6. Sign the certification and submit the W-9 form to the requester

CORPORATION OR PARTNERSHIP

If the LLC is a corporation or partnership, follow the steps below:

1. Enter the name of the LLC as recorded in the tax documents. If the LLC has a secondary business name, enter it on the second line, “Business Name”
2. Check the “Limited Liability Company” box
3. On the tax classification line, write a “P” for partnership, “S” for S Corporation, or “C” for the corporation
4. Enter the business address, city, state and zip code
5. Enter the employer ID number of the LLC
6. Sign and date the W-9 and submit it to the requester