

# Step by Step Instructions to E-File & Sign W9

The information provided is advise for first time independent contractors only

Before acting on the following information, you should do your own research and consult with a professional advisor necessary.  
Outfit disclaims all and any guarantees, undertakings and warranties, expressed or implied, and shall not be liable for any loss or damage whatsoever arising out of or in connection with any use or reliance on the information on this step by step document to filling out your w9 form. The user must accept sole or responsibility associated with the use of this information.

1. **NAME:** Insert your full legal name that would appear on your income tax return. If unsure, use the same as appears on your Social Security card.
2. **BUSINESS TYPE:** Tick the box for the type of entity you are. Most people who are starting out as an independent contractor who have not formally created a corporation or and LLC would be considered a individual/sole proprietary
3. **ADDRESS:** Please insert your business address. If you are operating as an independent contractor and you don't have office space and you haven't rented a mail box for your business address than you should use your home address
4. **SOCIAL SECURITY NUMBER:** Please insert your social security number

Form **W-9**  
(Rev. December 2011)  
Department of the Treasury  
Internal Revenue Service

**Request for Taxpayer Identification Number and Certification**

Give Form to the requester. Do not send to the IRS.

Name (as shown on your income tax return)  
**John Smith**

Business name/disregarded entity name, if different from above

Check appropriate box for federal tax classification:  
☒ Individual/sole proprietor ☐ C Corporation ☐ S Corporation ☐ Partnership ☐ Trust/estate  
☐ Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=partnership) ☐ Exempt payee  
☐ Other (see instructions) ☐

Address (number, street, and apt. or suite no.)  
**200 Varick Street**  
City, state, and ZIP code  
**New York, NY, 10014**  
List account number(s) here (optional)

Requestor's name and address (optional)

**Part I Taxpayer Identification Number (TIN)**  
Enter your TIN in the appropriate box. The TIN provided must match the name given on the "Name" line to avoid backup withholding. For individuals, this is 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 *How to get a TIN* on page 5.  
**Note.** If the account is in more than one name, see the chart on page 4 for guidelines on whose number to enter.

**Social security number**  
5 5 5 - 5 5 5 5  
**Employer identification number**  
- - - - -

**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).  
**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 4.

**Sign Here** Signature of U.S. person **Signature Here** **Date** **01/16/2018**

**SUBMIT & SIGN**

- 5a. **SIGN AND DATE:** Please e-sign and date the form. See further information below

**Sign Here** Signature of U.S. person **Signature Here** **Date** **01/16/2018**

**General Instructions**  
Section references are to the Internal Revenue Code unless otherwise noted.  
**Purpose of Form**  
A person who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) to report, for example, income paid to you, real estate transactions, mortgage interest you paid, acquisition or abandonment of secured property, cancellation of debt, or contributions you made to an IRA.  
Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN to the person requesting it (the requester) and, when applicable, to:  
1. Certify that the TIN you are giving is correct (or you are waiting for a number to be issued),  
2. Certify that you are not subject to backup withholding, or  
3. Claim exemption from backup withholding if you are a U.S. exempt payee. If applicable, you are also certifying that as a U.S. person, your allocable share of any partnership income from a U.S. trade or business.  
**Note.** If a requester gives you a form other than Form W-9 to request your TIN, you must use the requester's form if it is substantially similar to this Form W-9.  
**Definition of a U.S. person.** For federal tax purposes, you are considered a U.S. person if you are:  
• 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 (as defined in Regulations section 301.7701-7).  
**Special rules for partnerships.** Partnerships that conduct a trade or business in the United States are generally required to pay a withholding tax on any foreign partners' share of income from such business. Further, in certain cases where a Form W-9 has not been received, a partnership is required to presume that a partner is a foreign person, and pay the withholding tax. Therefore, if you are a U.S. person that is a partner in a partnership conducting a trade or business in the United States, provide Form W-9 to the partnership to establish your U.S. status and avoid withholding on your share of partnership income.

**Create Your Signature**

Please fill in your name and email and then either draw or type your signature below.

Full Legal Name  
John Smith

Your Initials  
JS

Email  
john.smith@gmail.com

Signature Type ☒ Type ☐ Draw ☐ Upload Custom

**Apply Signature**

☒ I agree to electronically sign and to create a legally binding contract between the other party and myself, or the entity I am authorized to represent.

Signature will be applied to the page. You will have a chance to review after signing.

6. **FINALIZE AND SUBMIT:** Click this button

**Finalize & Submit**

You will be able to save a copy after your submission.

7. **SEND EMAIL:** Click on the email symbol and send the email to your own email address.

**Thank you!**

Your submission is complete.

Your document has been successfully signed and a copy has been sent to all parties.

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8. **SHARE YOUR W9:** In the recipient field please insert your personal email address. Then go to your email inbox and save the W9file you just received on your computer and then go back to the sign up page on Outfit and simply upload the W9 using the 'Upload' button.

Your W9 will be stored securely and then only be sent out to clients once work and payments have been completed.

**Thank you!**

Your submission is complete.

Your document has been successfully signed and a copy has been sent to all parties.

**Share by Email**

Recipient(s):  
john.smith@gmail.com

Subject:  
SeamlessDocs: W9 Form

Note: (optional)  
I'd like to share this document with you.

**Cancel** **Send**