



Kerry Thomson
MAYOR

SUBSTITUTE W-9 & BANK/EFT FORM

(red boxes are required fields)

(Complete and Save form. Email or Fax to Controller's Office)

CITY OF BLOOMINGTON CONTROLLER'S OFFICE

401 N Morton St
Post Office Box 100
Bloomington IN 47402

p 812.349.3412

f 812.349.3456

controller@bloomington.in.gov

REQUEST FOR TAXPAYER IDENTIFICATION NUMBER AND CERTIFICATION: SUBSTITUTE W-9

Name (as shown on your tax return):										
Business Name/DBA (if different than above):										
Check appropriate box for federal tax classification: <input 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"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ▶ _____ <input type="checkbox"/> Other ▶ _____		Exemptions: Exempt payee code (if any) _____ Exemption from FATCA reporting code (if any) _____								
Address (number, street, and apt. or suite no.):										
City, State, and ZIP code:										
Telephone number:	Fax number:	Email:								
Check all that apply: <input type="checkbox"/> State or Local Government <input type="checkbox"/> City Employee <input type="checkbox"/> Contractual Employee <input type="checkbox"/> Farmer's Market Vendor <input type="checkbox"/> Grant Recipient										
List city department(s) you are doing business with (Parks, Fire, Utilities etc.):	Products or Services provided. Or if you are a Grant Recipient enter Grant.									
	Primary NAICS Code:	DUNS #:								
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 withhold. For individuals, this is your social security number (SSN). However, for a Resident alien, sole proprietor, or disregarded entity, see the Part 1 instructions on page 3 of IRS Form W-9. 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> on page 3 of IRS Form W-9		Social security number <table border="1" style="width:100%; height: 20px; border-collapse: collapse;"> <tr> <td style="width: 25px;"> </td> <td style="width: 25px;"> </td> <td style="width: 25px;">-</td> <td style="width: 25px;"> </td> <td style="width: 25px;">-</td> <td style="width: 25px;"> </td> <td style="width: 25px;"> </td> <td style="width: 25px;"> </td> </tr> </table>			-		-			
		-		-						
Note: If the account is in more than one name, see the instructions for line 1 and the chart on page 4.		Employer identification number <table border="1" style="width:100%; height: 20px; border-collapse: collapse;"> <tr> <td style="width: 25px;"> </td> <td style="width: 25px;"> </td> <td style="width: 25px;">-</td> <td style="width: 25px;"> </td> <td style="width: 25px;"> </td> <td style="width: 25px;"> </td> <td style="width: 25px;"> </td> <td style="width: 25px;"> </td> </tr> </table>			-					
		-								

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. person or other U.S. person (defined below), and
4. The FATCA codes(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 on page 3 of the IRS Form W-9.

Please mail or fax this complete form as soon as possible to the Controller's Office using the contact information above.

NO PAYMENTS WILL BE SENT UNTIL THIS FORM IS RECEIVED.

SIGN HERE	Signature of U.S. person ▶	Date ▶
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CITY OF BLOOMINGTON ELECTRONIC FUNDS TRANSFER FORM (EFT)

(Complete and Save form and attach to email)

Email completed forms to: controller@bloomington.in.gov

Call 812-349-3412 if you have any questions.

THE CITY'S PREFERRED METHOD OF VENDOR PAYMENT IS ELECTRONIC FUNDS TRANSFER (EFT) DIRECTLY TO THE VENDOR'S BANK. NO PAPER CHECKS WILL BE ISSUED WITHOUT THE APPROVAL OF THE CONTROLLER.

PLEASE COMPLETE THE SECTION BELOW TO ENROLL

Your Name	1001
Your Address	
PAY TO THE ORDER OF	DATE
	\$
Your Bank Name	DOLLARS
MEMO	
123456789	0000987654321
9 Digit Routing Number	Your Account Number
	1001
	Check Number

BANK INFORMATION FOR EFT TRANSFER

Bank Name:
Type of Account: <input type="checkbox"/> Checking <input type="checkbox"/> Savings
Routing Number:
Account Number:
Name of Account:
Email for Payment Notification:

REFERENCES FOR SOLE PROPRIETORS & PARTNERSHIPS

Name:	Address:
Phone:	Email:
Name:	Address:
Phone:	Email:
Name:	Address:
Phone:	Email:

HOW TO COMPLETE THE W-9 SUBSTITUTE FORM

1. Enter your name or business name as shown on your tax returns.
2. If you are doing business under a different name (DBA) enter this name in the second box.
3. Enter your tax classification. See the chart to the right for clarification.
4. Choose your exemptions if applicable.
5. Enter the street address for your home or business.
6. Enter the corresponding city, state, zip code, phone/fax and email address.
7. Enter the City Department who requested you complete this form. Use the drop-down arrow to select from a menu of city departments.
8. Enter the service or product you are providing to the City. Enter GRANT if you are receiving a grant.
9. Enter the tax identification number your taxes are filed under. This will be either a Social Security number, or Employer/Tax Identification number.
 - a. Sign and date the form.
 - b. Completed the EFT Form.
 - c. Return **both forms** to the email address shown below.

IF the entity/person on line 1 is a(n) . . .	THEN check the box for . . .
• Corporation	Corporation
• Individual • Sole proprietorship, or • Single-member limited liability company (LLC) owned by an individual and disregarded for U.S. federal tax purposes.	Individual/sole proprietor or single-member LLC
• LLC treated as a partnership for U.S. federal tax purposes, • LLC that has filed Form 8832 or 2553 to be taxed as a corporation, or • LLC that is disregarded as an entity separate from its owner but the owner is another LLC that is not disregarded for U.S. federal tax purposes.	Limited liability company and enter the appropriate tax classification. (P= Partnership; C= C corporation; or S= S corporation)
• Partnership	Partnership
• Trust/estate	Trust/estate

(Complete and Save form. Attach form and email to controller@bloomington.in.gov or print and fax to 812.349.3456)