

- ACCOUNTING DOCUMENTS
 - Adding W-9
 - Step 1 – Click on the “Add” button.

VRM Mortgage Services | Broker/Owner | Vendor

FAQ Main Menu Logoff

ID: [REDACTED] Name: [REDACTED] Primary Address: [REDACTED] (304) [REDACTED] Broker: [REDACTED]
 Status: Active Type: Real Estate Brokerage Address: Martinsburg, WV Analyst: [REDACTED]

GENERAL | **VENDOR INFORMATION**

ID: [REDACTED] MAS 500 Payee #: [REDACTED] History

Vendor Name: Vendor 2 [REDACTED] Broker Code: [REDACTED] History

Type: Real Estate Brokerage Conversion: No

Company Type: LLC

Save Cancel

DUE DILIGENCE | CONTRACTS | DIVERSITY | LICENSES

ACCOUNTING DOCUMENTS Help Show/Hide W-9 History **Add**

Legal Entity Name - DBA	Active	Uploaded On	Uploaded By	Reviewed By	Is Tin Verified	Is Approved	Action
Vendor 2 [REDACTED] Ja Aw...	Yes	6/25/2012 12:18 PM	System 1	Justin 40806		Yes - 7/26/2012	View

Step 2 – Enter the “Legal Entity Name” that appears on the W-9. Be careful not to enter the DBA in this field. If you have a DBA, it is optional to fill out. Select the “Identification Type”. Enter the “TAX Identification #”. Select the “Federal Tax Classification”. Check the 2 boxes to acknowledge the conditions. Click the “Save” button.

ADD ACCOUNTING DOCUMENT
Please enter legal entity name that agrees with the tax ID/ SSN given

Legal Entity Name: *

DBA (optional):

Identification Type: -Select-

Tax Identification #: *

Federal Tax Classification: -Select-

By providing a new W-9 that changes your Legal Entity Name, all due diligence documents on your profile will require re-review by your Vendor Analyst. Your profile will remain out of compliance until new Insurances, Licenses, and Contracts are provided that reflect your new Legal Entity Name.

If the SSN/EIN has changed, once verified all future payments will be issued against this new tax identification.

I acknowledge these conditions.
 I acknowledge that user profile will no longer be in compliance.

Click the “OK” button. This will take you to the DocuSign page to fill out the W-9.

Compliance Entities will be deactivated.

- **Step 3** – Click the Checkbox and select the Continue button

Please Review & Act on These Documents

DocuSign

Bobby Soiz
Vendor Resource Management

Please Review the Electronic Record and Signature Disclosure

I agree to use electronic records and signatures

- **Step 4** - Select "Sign". Then, the "Finish" button. This will upload the W-9 to your VMS profile for VRM to approve.

DocuSign Envelope ID: 308ADD13-9107-4661-95ED-23AEB8D9C61

DEMONSTRATION DOCUMENT ONLY
 PROVIDED BY DOCUSIGN ONLINE SIGNING SERVICE
 966 3rd Ave, Suite 1700 • Seattle • Washington 98104 • (206) 219-6290
 www.docusign.com

W-9 Request for Taxpayer Identification Number and Certification

Form 1099-INT
 Department of the Treasury
 Internal Revenue Service

Go to www.irs.gov/Form1099 for instructions and the latest information.

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

1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.
 ABC Company

2 Business name/disregarded entity name, if different from above

3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only one of the following except boxes:

Individual/sole proprietor or single-member LLC
 C Corporation
 S Corporation
 Partnership
 Trust/estate

Limited liability company. Enter the tax classification (D=C corporation, S=S corporation, P=Partnership) _____

4 Exemptions codes apply only to certain entities; not individuals; see instructions on page 1c.
 Exempt paper code (if any) _____
 Exemption from FATCA reporting code (if any) _____

5 Address (number, street, and apt. or suite no.) See instructions.
 21273 Main Street

6 City, state, and ZIP code
 Renton WA, 98055

7 List account number(s) here (optional)

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

8 Social security number
 _____ - _____ - _____


9 Employer identification number
 _____ - _____ - _____

Part III Certification

Under penalties of perjury, I certify that:

- 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
- 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
- I am a U.S. citizen or other U.S. person (defined below); and
- The FATCA code(s) entered on this form (if any), indicating that I am exempt from FATCA reporting, is correct.

Signature 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 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 improvement 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 for Part I, later.

Sign Here Signature of U.S. person*  Date: 2/24/2023

General Instructions * Form 1099-DIV dividends, including those from stocks or mutual funds