

# **Information Session: W-9 and Direct Deposit Forms**

## **Sesión informativa: Formularios W-9 y de depósito directo**

**AB617 San Joaquin Valley**

February 3, 2022

# Listening to Language Interpretation

# Cómo puede escuchar la interpretación al Español

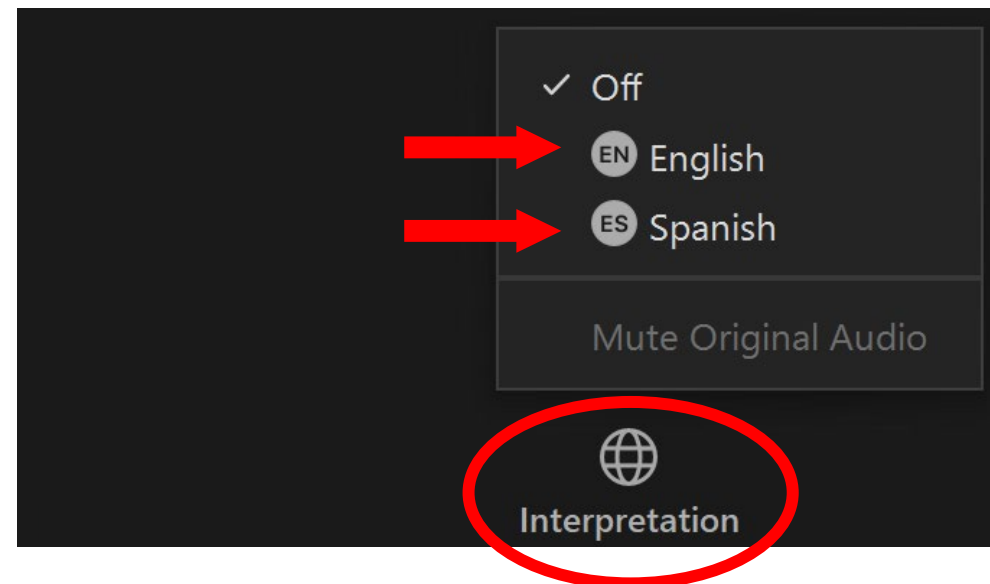
1. In your Zoom controls, click **Interpretation**. It is located at the bottom of the screen.

2. Click the language that you would like to hear. Please choose English or Spanish.

3. Ensure that Mute Original Audio is **not** selected so you can hear attendees who join through phone.

If you have questions during the meeting, please use the **Chat** feature and type in your question.

## ZOOM APP ON COMPUTER APLICACIÓN DE ZOOM POR COMPUTADORA



**EVERYONE** must be in a channel (English or Spanish) to hear the meeting

1. En los controles de Zoom, al final de la pantalla, den clic en **interpretación**

2. Den clic en el idioma que deseen escuchar. Por favor, elijan inglés o español.

3. Asegúrense de **no** seleccionar **Silenciar audio original** (*Mute Original Audio*), para poder escuchar a los asistentes que se unen a través del teléfono.

Por favor, si tienen preguntas durante la reunión, utilicen la función **Chat** para escribir su pregunta.

# Listening to Language Interpretation

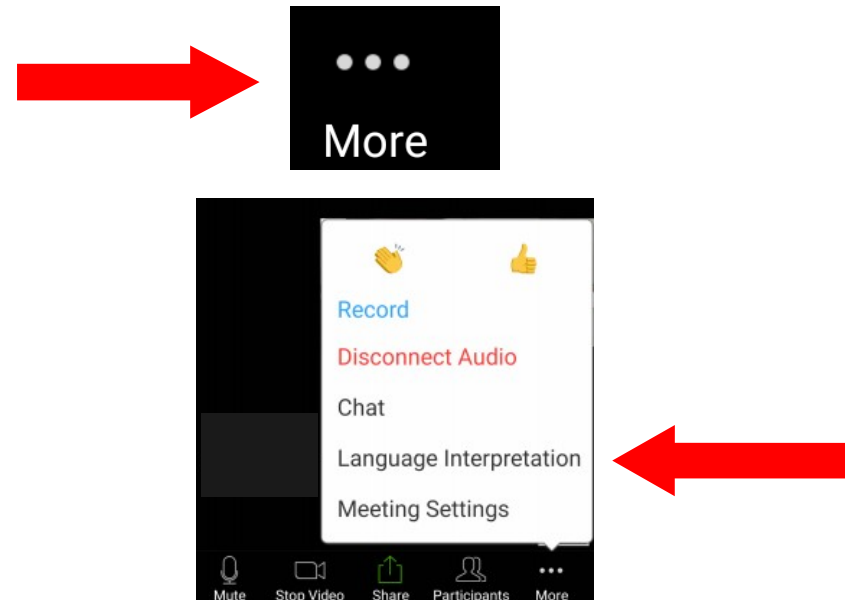
# Cómo puede escuchar la interpretación al Español

## ZOOM APP ON PHONE OR TABLET APLICACIÓN DE ZOOM POR TELÉFONO O TABLETA

1. In your Zoom controls, click **the three dots**. It is usually located at the bottom of the screen.

2. Click **language interpretation** from the menu and select the language that you would like to hear. Please choose English or Spanish.

3. Ensure that Mute Original Audio is **not** selected so you can hear attendees who join through phone.



**EVERYONE must** be in a channel (English or Spanish) to hear the meeting

1. En los controles de Zoom, den clic en **los tres puntos**. Se encuentran, comúnmente, al final de la pantalla.

2. En el menú, den clic en **interpretación** y seleccionen el idioma que deseen escuchar. Por favor, elijan inglés o español.

3. Asegúrense de **no** seleccionar **Silenciar Audio Original**. (*Mute Original Audio*), para poder escuchar a los asistentes que se unen a través del teléfono,

# Agenda

**1. Packet Overview**

**2. W-9 Form**

**3. Direct Deposit Form**

**4. Frequently Asked Questions**

**5. Q & A**

**1. Descripción general del paquete**

**2. Formulario W-9**

**3. Formulario de depósito directo**

**4. Preguntas frecuentes**

**5. Preguntas y respuestas**



# Packet Overview

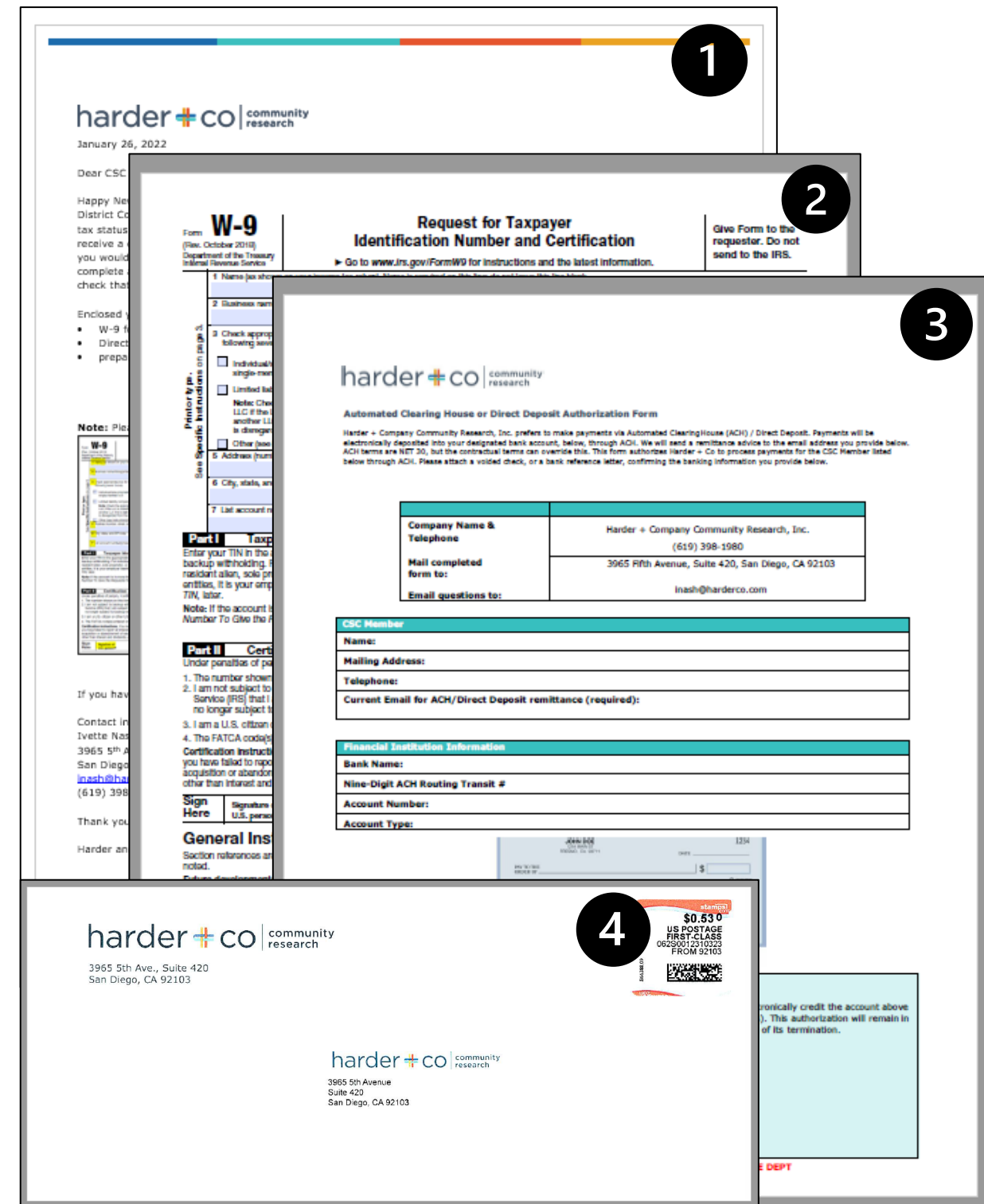
## Descripción general del paquete

### Your packet includes:

1. Harder & Company Letter
2. W-9 Form with instructions
3. Direct Deposit Form
4. Self-addressed envelope with postage

### Su paquete incluye:

1. La carta de Harder & Company
2. El formulario W-9 con instrucciones
3. El formulario de depósito directo
4. Un sobre con su dirección y con estampilla



# W-9 Form

## Formulario W-9

- We are requesting an updated W-9 from all CSC members who are attending the meetings and receiving monthly stipends.
- Estamos solicitando que todos los miembros del CSC, que asisten a las reuniones y que reciben estipendios mensuales, entreguen un formulario W-9 actualizado.

<p>Form <b>W-9</b> (Rev. October 2018) Department of the Treasury Internal Revenue Service</p>	<p><b>Request for Taxpayer Identification Number and Certification</b></p> <p>▶ Go to <a href="http://www.irs.gov/FormW9">www.irs.gov/FormW9</a> for instructions and the latest information.</p>	<p>Give Form to the requester. Do not send to the IRS.</p>
<p>Print or type. See Specific Instructions on page 3.</p>	<p><b>1</b> Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.</p>	
	<p><b>2</b> Business name/disregarded entity name, if different from above</p>	
	<p><b>3</b> Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only <b>one</b> of the following seven boxes.</p> <p> <input type="checkbox"/> Individual/sole proprietor or single-member LLC               <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) ▶ _____  <b>Note:</b> Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is <b>not</b> disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.  <input type="checkbox"/> Other (see instructions) ▶ _____         </p>	
	<p><b>4</b> Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):</p> <p>Exempt payee code (if any) _____</p> <p>Exemption from FATCA reporting code (if any) _____</p> <p><small>(Applies to accounts maintained outside the U.S.)</small></p>	
	<p><b>5</b> Address (number, street, and apt. or suite no.) See instructions.</p>	
	<p><b>6</b> City, state, and ZIP code</p>	
	<p><b>7</b> List account number(s) here (optional)</p>	

### W-9

1. Name
2. Business Name if applicable
3. Your federal tax classification
4. Exemptions (leave blank)
5. Your address
6. Your City, State, and ZIP code
7. Account number (leave blank)

### W-9

1. Nombre
2. Nombre del negocio (si corresponde)
3. Su clasificación tributaria federal
4. Exenciones (déjese en blanco)
5. Su domicilio
6. Su ciudad, estado y código postal
7. Numero de cuenta (déjese en blanco)

**For questions about Federal Tax classification and Exemptions consult with your Tax advisor.**

**Para preguntas sobre la clasificación y exenciones de impuestos federales, consulte con su asesor fiscal.**

# W-9 Form Part 1 & Part 2

## Formulario W-9 Parte 1 & Parte 2

**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*.

Social security number

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**Part 1** – Enter your Social Security Number (SSN) or TIN

**Parte 1** – Escriba el número de su seguro social o TIN

**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 assigned to me);
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 I am no longer subject to backup withholding; and
3. I am a U.S. citizen or other U.S. person (defined below); and
4. The FATCA code(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. For real estate transactions, item 2 does not apply. For acquisitions of secured property, cancellation of debt, contributions to an individual retirement arrangement, or other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN.

<b>Sign Here</b>	Signature of U.S. person ▶	Date ▶
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**Part 2** – Very important! Your Signature and date

**Parte 2** – ¡Muy importante! Su firma y la fecha



# W-9 Form Completed

## Formulario W-9 completado

**Please return W-9 (1st page only) in the pre-paid addressed envelope. As soon as possible.**

**Regrese el formulario W-9 (Solo la primera página) en el sobre con la dirección y prepagado. Lo antes posible.**



**W-9**  
Form (Rev. October 2018)  
Department of the Treasury  
Internal Revenue Service

**Request for Taxpayer Identification Number and Certification**

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

Go to [www.irs.gov/FormW9](http://www.irs.gov/FormW9) for instructions and the latest information.

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

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 seven boxes.

4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 2).

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

6 City, state, and ZIP code

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.

Note: If the account is in more than one name, see the instructions for line 1. Also see What Name and Number To Give the Requestor for guidelines on whose number to enter.

harder + co | community research  
3965 5th Ave., Suite 420  
San Diego, CA 92103

harder + co | community research  
3965 5th Avenue  
Suite 420  
San Diego, CA 92103

Stamp: \$0.53 US POSTAGE FIRST-CLASS 06290012310323 FROM 92103

Call No. 10291K Form **W-9** (Rev. 10-2018)



# Direct Deposit Form: CSC Member Section

## Formulario de depósito directo: Sección: Miembro de CSC

CSC Member
<b>Name:</b>
<b>Mailing Address:</b>
<b>Telephone:</b>
<b>Current Email for ACH/Direct Deposit remittance (required):</b>

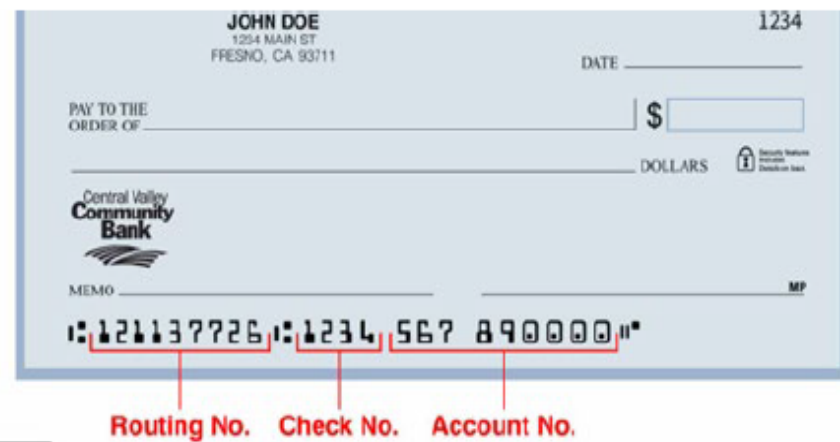
1. Your Name (as it appears on your bank)
2. Your current mailing address
3. Your current telephone number
4. Your current email address (**Required for Direct Deposit**)

1. Su nombre (según aparece en su banco)
2. Su dirección
3. Su número de teléfono
4. Su actual correo electrónico (**Se requiere para el depósito directo**)

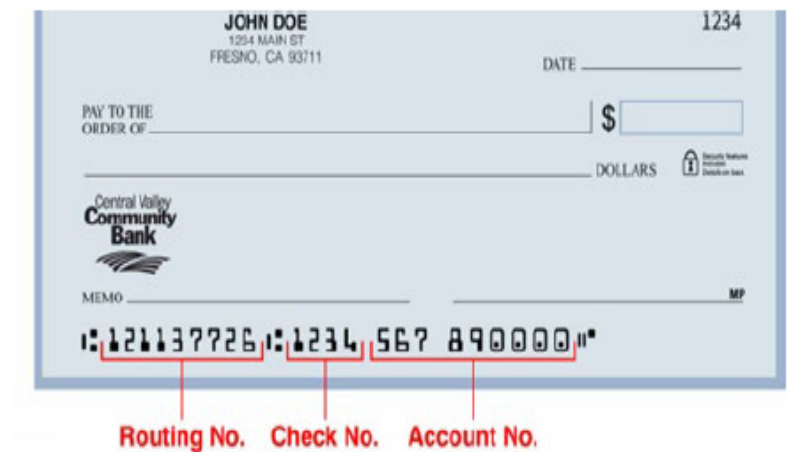
# Direct Deposit Form: Financial Institute Information

## Formulario de depósito directo: Información del Instituto Financiero

Financial Institution Information	
Bank Name:	Bank where you want the direct deposit made to
Nine-Digit ACH Routing Transit #	see check image
Account Number:	see check image
Account Type:	see check image



Financial Institution Information	
Bank Name:	El banco a donde se hará el depósito directo
Nine-Digit ACH Routing Transit #	véase la imagen del cheque
Account Number:	véase la imagen del cheque
Account Type:	véase la imagen del cheque



# Direct Deposit Form - Authorization

## Formulario de depósito directo - Autorización

**Authorization**

I hereby authorize the above named client (Harder + Co Community Research, Inc.) to electronically credit the account above for payments (and, if necessary, electronically debit the account to correct erroneous credits). This authorization will remain in full force and effect until the above named client receives written notification of its termination.

Name: \_\_\_\_\_

Signature (REQUIRED) \_\_\_\_\_

Address \_\_\_\_\_

Date \_\_\_\_\_

### Authorization Section

1. Your Name (as it appears on your bank)
2. Your Signature (**Required for Direct Deposit**)
3. Your Address
4. Date

### Sección: Autorización

1. Su nombre (según aparece en su banco)
2. Su firma (**Se requiere para el depósito directo**)
3. Su domicilio
4. Fecha

# Frequently Asked Questions

## Preguntas frecuentes

### 1. Why do I need to fill out a W-9?

*Answer:*

- We want to verify and update the information that we rec'd from the previous facilitators is correct. By providing us with the W-9 form, it helps us ensure that we have correct and complete information, especially tax id (social security) numbers.
- We are required to issue Tax Form 1099 at the end of the year to anyone who receives \$600 or more in stipends.
- This will help cut down on mis-directed checks.

### 1. ¿Por qué necesito llenar el formulario W-9?

*Respuesta:*

- Deseamos actualizar y verificar que son correctos los datos que recibimos por parte de los facilitadores anteriores. El proporcionarnos el formulario W-9 ayuda a que nos aseguremos de contar con los datos completos y correctos, en particular, los números de su identificación tributaria (seguro social).
- Al finalizar el año, estamos obligados a enviarle a todo aquel que reciba \$600 o más en estipendios el formulario *Tax Form 1099*.
- Esto ayuda a que disminuyan los cheques mal dirigidos.

### 2. Is my stipend check taxable income?

Answer: Yes

### 2. ¿ Mi estipendio, es sujeto a impuestos?

Respuesta: Sí

# Frequently Asked Questions

## Preguntas frecuentes

### **3. When do I need to return the W-9 form?**

*Answer:* Your W-9 form must be received by February 20<sup>th</sup>, 2022.

### **3. ¿Cuándo necesito regresar el formulario W-9?**

*Respuesta:* Para el 20 de Febrero de 2022, se requiere su formulario W-9.

### **4. When do I need to return the Direct Deposit form?**

*Answer:* The direct deposit form is optional. You can return it in the pre-paid envelope with the W-9.

### **4. ¿Cuándo necesito regresar el formulario de depósito directo?**

*Respuesta:* El formulario de depósito directo es opcional. Puede regresarlo en el sobre prepagado junto con el formulario W-9.

### **5. Do we need to fill this out every year?**

*Answer:* Yes, to make sure we have your current information.

### **5. ¿Es necesario llenar el formulario todos los años?**

*Respuesta:* Sí, para asegurarnos de que tenemos su información actual..

# Frequently Asked Questions

## Preguntas frecuentes

### **6. How is my information stored?**

*Answer:* All paper and electronic information is stored in a secure locked location where Accounting and Administrative Operations Assistant have access to.

### **6. ¿Cómo guardan mis datos?**

*Respuesta:* Todos los datos que se reciben por la vía electrónica o en papel se guardan en un lugar seguro bajo llave y tienen acceso a estos datos el departamento de contabilidad y la asistente de operaciones administrativas

### **7. When does my stipend check get mailed out?**

*Answer:* Stipend checks are sent to your mailing address on the first and/or fourth week each month.

### **7. ¿Cuándo me enviarán por correo el cheque de mi estipendio?**

*Respuesta:* Los cheques de los estipendios se envían a su dirección la primera o cuarta semana de cada mes.

### **8. Who do I call regarding status of my stipend check?**

*Answer:* Call Harder & Company main line (619) 398-1980 to reach Ivette Nash

### **8. ¿Con quien puedo comunicarme acerca de mi cheque de estipendio?**

*Respuesta:* Comuníquese con Ivette Nash de la compañía Harder & Company; línea principal: (619) 398-1980



# Frequently Asked Questions

## Preguntas frecuentes

### **9. What happens if I do not send in my W-9 form?**

*Answer:* This will put a hold on your monthly stipend check until we receive the completed form.

### **9. ¿Qué sucede si no envío mi formulario W-9?**

*Respuesta:* Esto retrasará su cheque de estipendio mensual hasta que recibamos el formulario completo.

### **10. When should I expect my first direct deposit after I send the form?**

*Answer:* Depending on when your form is received. If the form is received on a Monday of the processing week (4th week) then accounting should be able to process the payment for the next payment run (same week), but it can take up to the next expected stipend disbursement.

### **10. ¿Cuándo debo esperar mi primer depósito directo después de enviar el formulario?**

*Respuesta:* Dependiendo de cuándo se reciba su formulario. Si el formulario se recibe un lunes de la semana de procesamiento (4ª semana), entonces la contabilidad debería poder procesar el pago para la próxima ejecución de pago (la misma semana), pero puede tomar hasta el próximo desembolso de estipendio esperado.

# Frequently Asked Questions

## Preguntas frecuentes

### **11. What is the address to send the forms back to?**

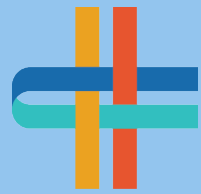
*Answer:*

Attn: Ivette Nash  
Harder & Company  
3965 5<sup>th</sup> Avenue, Suite 420  
San Diego, CA 92103

### **11. ¿A que dirección hay que regresar los formularios?**

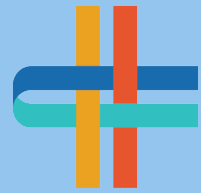
*Respuesta:*

Attn: Ivette Nash  
Harder & Company  
3965 5<sup>th</sup> Avenue, Suite 420  
San Diego, CA 92103



# QUESTIONS

# PREGUNTAS



# THANK YOU GRACIAS

## Contact:

**Ivette Nash**

**Administrative Operations Assistant**

E-mail: [inash@harderco.com](mailto:inash@harderco.com)

3965 5th Avenue, Suite 420

San Diego, CA 92103

Phone: (619) 398-1980

## Contacto:

**Ivette Nash**

**Asistente de Operaciones Administrativas**

Correo electrónico: [inash@harderco.com](mailto:inash@harderco.com)

3965 5th Avenue, Suite 420

San Diego, CA 92103

Tel. (619) 398-1980