

Tax Ready Bookkeeping

W-9 Request Email Templates

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Template 1: Initial W-9 Request (New Vendor)

Subject: W-9 Required for Vendor Setup - [Your Company Name]

Hi [Contact Name],

Thank you for doing business with [Your Company Name]. Before we can process our first payment to [Vendor Company Name], we need to complete your vendor setup in our system.

Required for Vendor Setup:

Please provide a completed **IRS Form W-9** (Request for Taxpayer Identification Number and Certification).

Why we need this: - To ensure accurate 1099 reporting as required by the IRS - To verify your business information matches our records - To process payments without delay

How to submit: - Download a blank W-9 from the IRS: <https://www.irs.gov/pub/irs-pdf/fw9.pdf>
- Complete and sign the form - Reply to this email with the completed W-9 attached - Or fax to: [Your Fax Number]

Important notes: - The name on Line 1 must match your tax records exactly - Electronic signatures are acceptable - We keep all W-9 forms secure and confidential

Once we receive your W-9, we'll complete your vendor setup and process your invoice(s) within our standard payment terms.

Please submit within **5 business days** to avoid payment delays.

Questions? Reply to this email or call [Your Phone Number].

Thank you,

[Your Name] [Your Title] [Your Company Name] [Phone] | [Email]

Template 2: W-9 Reminder (Follow-up)

Subject: Reminder: W-9 Still Needed - Payment Pending for [Vendor Company Name]

Hi [Contact Name],

This is a friendly reminder that we still need a completed W-9 from [Vendor Company Name] before we can process payment.

Status: Your invoice(s) totaling \$[Amount] are awaiting vendor setup completion.

What we need: A completed IRS Form W-9

How to submit: - Download: <https://www.irs.gov/pub/irs-pdf/fw9.pdf> - Email completed form to: [Your Email]

We understand paperwork can slip through the cracks. If you've already sent this, please let me know and I'll check with our team.

Need help? If you have questions about completing the W-9, I'm happy to assist. It typically takes less than 5 minutes to complete.

Thank you for your prompt attention to this matter.

[Your Name] [Your Title] [Your Company Name] [Phone] | [Email]

Template 3: Final Notice (Urgent)

Subject: URGENT: W-9 Required Immediately - Payment Hold for [Vendor Company Name]

Hi [Contact Name],

This is our final request for a completed W-9 from [Vendor Company Name].

Current Status: - Outstanding invoices: \$[Amount] - Days pending: [X] days - Required: IRS Form W-9

Our policy requires a valid W-9 on file before any payment is issued. Without this form, we cannot comply with IRS reporting requirements and cannot release payment.

Please submit your W-9 within 48 hours to avoid further payment delays.

Immediate options: 1. Email: Attach completed W-9 to this email 2. Fax: [Your Fax Number] 3. Call: [Your Phone Number] - we can assist you in completing the form

If there's an issue preventing you from submitting the W-9, please contact us immediately so we can discuss alternatives.

We value our business relationship and want to resolve this quickly.

Thank you,

[Your Name] [Your Title] [Your Company Name] [Phone] | [Email]

Template 4: Year-End W-9 Request (Existing Vendor)

Subject: Action Required: W-9 Update for 1099 Reporting - [Tax Year]

Hi [Contact Name],

As we approach year-end, we're verifying vendor information to ensure accurate 1099 reporting. Our records indicate we need an updated W-9 for [Vendor Company Name].

Why we're reaching out: - We may not have a W-9 on file for your company - Or your information may have changed since you were set up - IRS penalties for incorrect 1099 forms have increased significantly

What we need: A current, completed IRS Form W-9 confirming: - Legal business name - Business address - Tax Identification Number (EIN or SSN)

1099 Deadline reminder: - 1099-NEC forms must be issued by January 31 - We need your W-9 by **[Date - typically mid-January]** to meet this deadline

Submit your W-9: - Download: <https://www.irs.gov/pub/irs-pdf/fw9.pdf> - Email completed form to: [Your Email]

Check your information: According to our records, we have: - Name: [Current Name on File] - Address: [Current Address on File] - Payments [Year]: \$[Total]

Please confirm this is correct or provide updated information with your W-9.

Thank you for your prompt response.

[Your Name] [Your Title] [Your Company Name] [Phone] | [Email]

Template 5: W-9 Thank You / Confirmation

Subject: W-9 Received - Vendor Setup Complete for [Vendor Company Name]

Hi [Contact Name],

Thank you for submitting your W-9. Your vendor setup for [Vendor Company Name] is now complete.

Confirmed information: - Vendor Name: [Legal Name from W-9] - Payment Address: [Address] - 1099 Tracking: Enabled

What happens next: - Your invoice(s) will be processed according to our standard payment terms - You'll receive payment notification when funds are sent - At year-end, you'll receive a 1099-NEC if payments exceed \$600

Payment details: - Payment terms: [Net 30/Net 15/etc.] - Payment method: [Check/ACH/etc.] - Pending invoices: \$[Amount] - Expected payment date: [Date]

If your business information changes (name, address, TIN, entity type), please send us an updated W-9 promptly.

Thank you for doing business with us!

[Your Name] [Your Title] [Your Company Name] [Phone] | [Email]

W-9 Collection Best Practices

When to Request

- Before first payment (not after)
- When vendor information changes
- Annually for verification
- When payment method changes

What to Verify

- Name matches exactly (no nicknames, abbreviations)
- TIN is complete (9 digits)
- Form is signed and dated
- Entity type is marked
- Address is complete

Red Flags

- Reluctance to provide W-9
- Mismatched names (invoice vs. W-9)
- P.O. Box only with no physical address
- Requests to change payment after W-9 provided

Storage

- Store W-9s securely (encrypted or locked)
- Maintain for 4+ years after last payment
- Keep digital backup
- Restrict access to authorized personnel

For more resources: projectbits.com/taxready/ch2

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