



## **Filling out W-9 as a Property Owner/ Landlord** **W-9 Explanation, Questions and Answers**

Samaritan House and Daly City Community Service Center; a program of the Daly City Partnership, are core resource agencies for San Mateo County communities. We assist program participants with a wide range of issues including rental and utility assistance, emergency car repair, enrollment and navigation in healthcare programs, and, where possible, other programs dedicated to building participant self-sufficiency. Samaritan house is the fiscal partner for Daly City Community Service Center and they are responsible for check distribution.

### **What is a W-9?**

A W-9 is a document that the IRS provides for individuals, corporations, etc. to utilize in verifying their social security or tax identification number to other entities. It is filled out by you or your representative.

### **Is it required? Why do you need my information if it is the tenant who is applying for assistance?**

Yes, it is required whenever we are paying out a check that is considered income to the owner. This is required so that our fiscal agent is able to verify that we are paying the proper owner of the property directly, which, for example, can be in the case of back rent, emergency car repair, deposit, etc. Information from the W-9 and the amount paid to you from our funds is reported to the IRS at the end of the year as is required of our fiscal agent by law.

### **How does this help my tenant?**

If your tenant qualifies for one-time emergency assistance through one or more of our housing assistance program sources of funding, our fiscal agent is able to verify that we are paying the proper owner of the property directly and your tenant will be given the opportunity to remain stably housed in the face of a crisis that they had little, or in most cases, no control over. As you know, there is a housing crisis in the bay area and we greatly appreciate your willingness to make a meaningful impact in the work of keeping working families and seniors off the streets. For example, many of our tenants face no-cause evictions and it can be very difficult to save enough for the high deposit amounts required in this area. Other clients face the difficult decision of paying a large car repair so they can continue to get to work or being late on the rent. In these cases, most clients qualify for funding pending a W-9 from the owner, and our funding partners require checks be paid directly to the owner, not to the tenant.

### **What is done with my information?**

Information from the W-9 and the amount paid to you from our funds is reported to the IRS at the end of the year.

### **Daly City Community Service Center; A Program of Daly City Partnership**

350 – 90<sup>th</sup> • Street Daly City, CA 94015 • Main: (650) 991-8007 • Fax: (650) 991-8227

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### **Is it confidential?**

Your information as well as the tenant's information is kept completely confidential. The only two agencies that have access to your information are the registered non-profits: The Daly City Community Service Center, a program of The Daly City Partnership that processes the initial application, and Samaritan House which is responsible for check distribution. Only a handful of high-level staff ever has cause to see your information as a part of the application process. All staff are trained to diligently maintain confidentiality of all documents.

### **What happens if funding is approved?**

Once approved, check(s) arrive in the mail within **7-10 business days**. Please notify the case manager if you need the funds sooner. You must return the check to Samaritan House if you are unable to use the funds as indicated within **10 working days**.

### **What do I do with the check once I receive it? Do I have to return the deposit to the agency once the tenant moves out?**

- This funding is a grant, not a loan. The client was awarded this grant based on his/her risk of homelessness, and this grant should be treated as if the funds came from the client(s) themselves.
- These funds may be used only for the purpose stated. Purpose is on the subject of the check.
- If this assistance serves as a security deposit, you must comply with all applicable state and local laws regarding security deposit refunds when the above-mentioned tenant moves from the unit. The security deposit is never returned to the agency; the intention is that the client will receive the security deposit in the case of a move-out so that they can continue to remain stably housed and don't need to return to our agency for assistance in the future.

### **What do I need to do?**

Please fill out the W-9 form and follow the accompanying instructions. Once completely filled out, signed and dated, please fax (650-991-8227), email, mail or drop-off at our office: 350-90<sup>th</sup> Street, First Floor, Daly City, CA 94015. If you have additional questions, please call us at 650-991-8007.

We thank you in advance for your time and patience and for giving people an opportunity to maintain permanent housing.

<https://www.irs.gov/pub/irs-pdf/fw9.pdf>



*Our programs would not be possible without your cooperation! The partnership thrives with generous donations from local landlords and business owners. Donations are gladly accepted at [www.dcpartnership.org](http://www.dcpartnership.org) ...working together to enrich life in our community*

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