**W-9 Request Frequency – Notes for further discussion**

Request frequency depending on type of vendor

* Non-1099 vendors providing regular service
* Non-1099 vendors providing irregular service
* 1099 vendors providing regular service
	+ Directors
	+ Foley & Lardner
	+ Deloitte
	+ Steven Baas/Liberty House
	+ Comstar (Foundation website)
	+ Miller House trusts
	+ WIPFLI
* 1099 vendors providing irregular service
	+ Bradley Prize selectors
	+ Board meeting/dinner speakers
	+ Alida Harper-Trocke/House on the Dirt
	+ Active Engagement LLC (Bradley Prize website)

Non-1099 vendors

Request an updated W-9 when notified of a change in the vendor, such as a change of name or purchase/merger of the entity.

1099 vendors

Directors – Request W-9 upon approval of new director, and request updated W-9 every \_\_\_ years (with all directors on same cycle). Request sent with November board materials, and blank copies provided in RCR for directors to complete while in Milwaukee for November meeting. Follow up immediately after board meeting with Directors who did not return a completed form.

Other Individuals – If ­­\_\_ years have passed since the last time the individual was paid for services, then request an updated W-9. If the individual has been issued a 1099 every year, then request an updated W-9 every \_\_ years.

Entities – Request updated W-9 every \_\_ years