Important Annual Tax Information for 2015
Northwestern receives and sends many tax forms, especially this time of year. For your information and reference, contacts for the various tax forms are listed below.

Tax forms issued by Northwestern:

W-2 Statement of Wages (to employees)  
Contact: Payroll Office, Geetali Rajwani  847.491.7362

1098-T Tuition Payments Statement (to students)  
Contact: Office of Student Accounts  847.491.5224

1098-E Student Loan Interest Statement (to students)  
Contact: Student Loans, Lupe Castaneda  847.491.3125

1099-K Payment Card and Third Party Network Forms  
Contact Accounting Services, Veronica Hudgins  847.491.5337  
Forward to:  
Accounting Services, 619 Clark St, Evanston Campus, Attn: Veronica Hudgins

1099-MISC. Miscellaneous Income (to various independent contractors, attorneys, others) Contact Accounting Services, Veronica Hudgins  847.491.5337

- 1099-MISC. is issued by the University to individuals reflecting cumulative payments for services, or awards totaling $600 or more for the calendar year, and royalties totaling $10 or more for the calendar year. They are generated by NUFinancials to individuals and attorneys who are coded as taxable vendors and have received taxable payment.

- Note: reimbursements of expenses are not taxable and should be paid on a non-taxable expense code, such as 75015 Professional Services Reimbursement or 76710 General Travel.

Tax forms received by Northwestern:
Contact: Accounting Services, Veronica Hudgins  847.491.5337  
Or forward these forms to:  
Accounting Services, 619 Clark St, Evanston Campus, Attn: Veronica Hudgins

- W-9: Request for Taxpayer ID (the University is being asked for its taxpayer identification number by an outside vendor)
- 1099-K: Payment Card and Third Party Network Forms
- 1099-MISC.: Miscellaneous Income
- 1099-DIV: Dividend Income (information on payments made to the University by outside entities)
- 1099-R: Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts
OTHER TAX ITEMS OF NOTE

For additional information about tax issues and forms, please visit:
http://www.northwestern.edu/controller/accounting-services/tax/index.html

- Federal tax exempt status
  http://www.northwestern.edu/controller/accounting-services/tax/tax-exempt-status.html

- State sales tax exempt status
  http://www.northwestern.edu/procurement/policies-forms/tax-exempt-status.html

Important Guidance: University Charitable Donations Policy
This policy provides guidance for circumstances in which the University is asked for
donations on behalf of another organization and discusses related tax issues.
The Charitable Donations Policy may be found at:

Tax contact:

Nancy Pinchar
Interim Controller and Director of Accounting Services
Financial Operations
Northwestern University
619 Clark Street
Evanston, IL 60208
n-pinchar@northwestern.edu
847.491.4724

www.northwestern.edu/financial-operations/controller