



2016

TAX REFERENCE GUIDE

SOFTWARE ● FORMS ● E-FILE

WHAT'S NEW FOR 2016

ACA – Healthcare coverage forms see page 13 and the supplemental catalog in your 2016 Tax Sales Kit.

IRS FILING DEADLINES CHANGED FOR W-2 AND 1099MISC BOX 7 NON-EMPLOYEE COMPENSATION see page 34.

THE FOLLOWING FORMS WILL REQUIRE REPROGRAMMING:

1042-S, 1096, 1098, 1098-T, 1099-B, 1099-OID, 1099-R, W-2G, Please be aware that additional forms may be affected as the IRS approves forms throughout the year.

SIMPLIFY YOUR CUSTOMERS' FILING PROCESS, ADD SOFTWARE TO YOUR ORDER – see page 18 for all our software solutions.

ASK US ABOUT OUR E-FILE SOLUTIONS THAT ARE AVAILABLE FOR YOU AND YOUR CUSTOMERS

Search and view all our forms online at www.taxformwizard.com



PRODUCT DIRECTORY BY FORM NUMBER

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1042	Series Form 1042S	30	5225	Laser Blank W-2 4 up Box 14" PressureSeal	7
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1095	Affordable Care Act (ACA)	13	5227	Laser Blank W-2 4 up horiz. 14" PressureSeal	7
1096	Series Form 1096	29	5228	Laser W-2 - 4-up horizontal 14" PressureSeal	7
2098	Series Form 1098 Mailer	27	5229	11" Blank PressureSeal	7
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5177	Laser 1099R PressureSeal	7	7505	Series Form W-2 Mailer	21
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TERMS AND CONDITIONS

GOVERNMENT APPROVED TAX FORMS

GENERAL INFORMATION

- MULTI-STATE RESALE CERTIFICATE:** We must have a valid resale certificate on file and follow regulation 1706 regarding drop shipments in order to be in Compliance with State laws. If we do not have a valid resale certificate on file we are required by law to charge sales tax. For additional information on regulation 1706 visit the Board of Equalization site www.boe.ca.gov
- MINIMUMS:** \$18.00 minimum-net per shipment and per location, plus shipping (excluding rush charges).
- RUSH SERVICE:** All rush orders received by 1:00 p.m. (shipping warehouse time zone) will be shipped same day. In addition to shipping cost, a **\$25.00 Premium Service Rush charge** will be billed for stock forms per shipping address.
- RETURNS:** Absolutely NO unauthorized returns. Authorized returns will be issued a 75% credit on merchandise excluding shipping charges. **Minimum restock fee \$10, maximum \$75.00.** Authorized returns after December 1, 2016 must be within 30 days of invoice date. Prior approval and return goods (RG) number must be obtained before returning stock. The RG number MUST be shown on the label.
- UNDELIVERABLE RETURNS:** Package carriers charge return freight on shipments that are undeliverable or have been refused by consignee. Due to this policy, TFP will be charging returned freight charges on all packages refused by your customer or deemed undeliverable due to inadequate or incomplete address. The cost of the returned freight will be the same as the original freight charged on the order.
- ADDRESS CORRECTIONS:** All shipments with incomplete or inaccurate addresses resulting in address corrections will be charged an address correction fee of \$13.00 per carton. Additional Delivery Fees will apply if shipment requires a reroute of shipment due to change of address, intercept request and/or delivery for future date.
REDIRECTED DELIVERY: All requested UPS redirected deliveries will be charge \$14.00 per carton, if we are able to have the delivery redirected successfully.
- RESHIPMENTS:** Reshipments will ship same method as original order. Our liability is limited to the replacement of forms only. We will not issue credits on duplicated orders. All claims must be made within 30 days. NO credit will be issued on reorders due to freight delays (i.e., Weather, Acts of God, etc.).
- QUANTITIES:** Please order even quantities as indicated on retail price lists. Odd quantities up to 1,000 will be billed at next highest bracket. **ORDER BY FORM QUANTITY, NOT SHEETS OR PAGES.**
- PRICE QUOTES:** Call for special pricing on large quantities of forms. All special pricing is F.O.B. Oxnard, CA or new shipping warehouse in Cranberry, NJ.
- CANCELLATIONS:** **There is a \$10.00 charge if an order is cancelled and/or changed before shipping.** A cancellation is void if it reaches us after the merchandise has shipped. **A \$10.00 charge will also apply if an order is changed at the time of a will call pick-up.**
- TERMS:** Our terms are net 30 days from date of invoice. A 1-1/2% per month finance charge will be charged on all PAST DUE accounts.
- CHARGE BACKS:** Any returned checks or credit card charge backs will carry a \$20.00 service charge.
- NEW ACCOUNTS:** All orders will be shipped Cash In Advance (Check, M/C, Discover, VISA, American Express accepted) until a line of credit is established. Credit checks begin after receipt of application.
- SHIPPING:** All shipments F.O.B. from our nearest warehouse with stock available. **WE ARE NOT RESPONSIBLE FOR SHIPPING DELAYS ONCE THE FREIGHT HAS LEFT OUR WAREHOUSE.** Allow 1-2 business days on stock orders; 3-5 working days on imprinted form orders and additional time for larger quantities.
- All Orders received on Saturday will be processed as though received on Monday.
- FORMATS:** It's important that your customer indicate their required format. (Samples for test runs are available at no charge). We regret we cannot accept the return of damaged or used forms due to programming or equipment incompatibility. We can FAX formats to you. **All orders are filled on the basis of the PRODUCT NUMBER specified, not item description.**

ALL ACCOUNTS ARE PROTECTED

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- Confirm cost of order
- View your order history online
- Use your online order history to reorder
- Print a copy of your invoice

If you're not already registered call us today at 800-482-9367

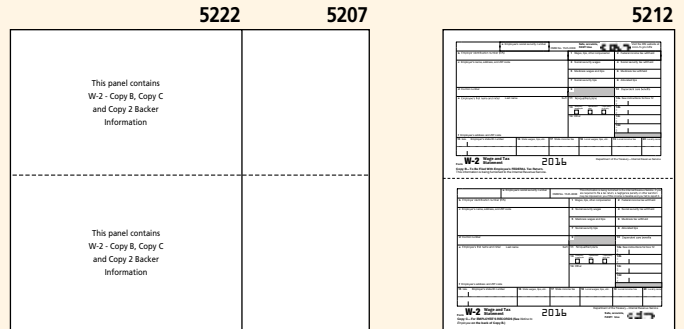
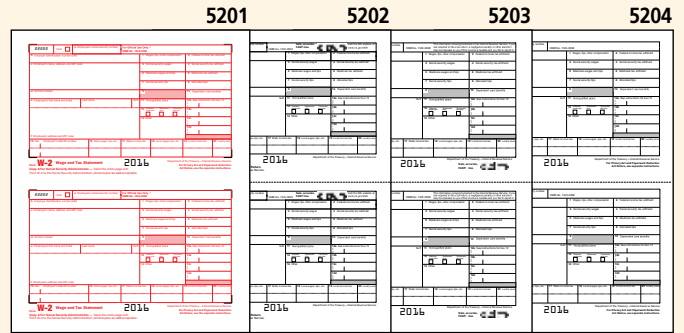
The screenshot shows the TFP Data Systems website interface. At the top, there's a navigation bar with links for Home, Tax Forms, Health Forms, Compliance Products, and Marketing Resources. Below the navigation bar is a banner area with a welcome message: "Our New Website is All About You!" and "Welcome to the new tfpdata.com! We're excited to introduce you to our revamped website. Many of the enhancements we've made are a direct result of feedback we've received from you, our valued partner." Below the banner are three product category tiles: "Tax Forms Up-to-date forms. Get them here!", "Health Forms Forms for every state. Get them here!", and "ComplyRight New products here. Get them here!". At the bottom of the screenshot, there are two main sections: "Tax Form Wizard" and "Quick Form Search". The "Quick Form Search" section includes a search bar with the text "Search TFP Data to find your forms! Enter your form number below (excluding dashes) and hit 'Find My Forms' to view your PDF." and a "Find My Forms" button.

Forms for Laser Printers

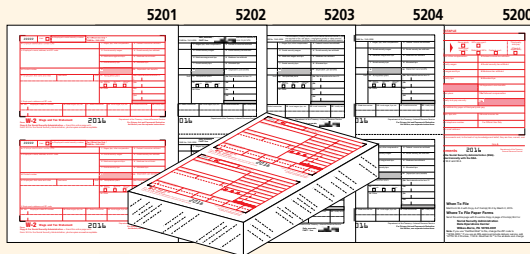
W-2s

All 2 up Laser W-2s contain filing information for two separate employees (1 page = 2 forms). A separate item number has been assigned to each part. All other W-2s pictured (except employer Forms 5215, 5217, 5405, 5405A and 5406) contain filing information for one employee (1 page = 1 form). Our Laser W-2s are available in standard and bulk packages (see below).

Form Description	Form # 100 Forms Per Package	Form # 1000 Forms Bulk Package
W-2 Federal IRS Copy A (1 page equals 2 forms)	5201	5201-B
W-2 Employee Copy B to be filed with federal return (1 page equals 2 forms)	5202	5202-B
W-2 Employee Copy 2 and/or Copy C to be filed with state return and/or for employee records. (1 page equals 2 forms)	5203	5203-B
W-2 Employer Copy 1 and/or Copy D (1 page equals 2 forms)	5204	5204-B
W-2 Blank - One Center Cross Perf.	5207	5207-B
Two employees per page (1 page equals 2 forms)		
W-2 Blank - with Backer - One Center Cross Perf. (1 page equals 2 forms)	5222	5222-B
W-2 Employee Copy B and Copy C		(500 Forms Bulk Package)
One employee per page (1 page equals 1 form)	5212	5212-B
Order By: # of Forms		# of Packages



If you require the equivalent of 100 – 6 part W-2 forms, you would order:
 100 – 5201 (Copy A) 200 – 5203 (Copy 2 and/or Copy C)
 100 – 5202 (Copy B) 200 – 5204 (Employer, State, City or Local Copy 1)



6666-1 Double Window Envelope or 6666-2 Self-Seal Double Window Envelope – See page 17 for more information.

Convenience and Bonus Sets Available – See Pages 13, 14, 15 and 16

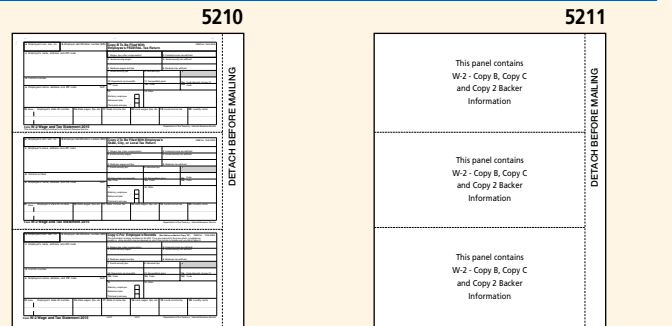


W-2 FORM PARTS DESCRIPTION

EMPLOYER'S COPIES		EMPLOYEE'S COPIES	
Copy A	For Social Security Administration	Copy B	To be filed with Employee's Federal Tax Return
Copy 1	For State, City, or Local Tax Department	Copy C	For Employer's Records
Copy D	For Employer's Records	Copy 2	To be filed with Employee's State, City or Local Income Tax Return

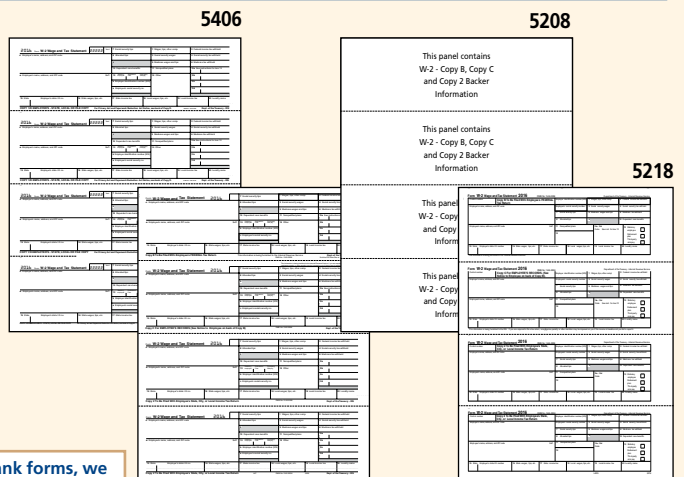
Form Description	Form # 100 Forms Per Package	Form # 500 Forms Bulk Package
W-2 Employee Copy B, 2 and C	5210	5210-B
One employee per page (1 page equals 1 form)		
W-2 Blank - Two Horizontal Perfs (with Backer).	5211	5211-B
One employee per page (1 page equals 1 form)		
Order By: # of Forms		# of Packages

3333-1 or 3333-2 Self-Seal – Required Envelope
 See Page 17 for more information



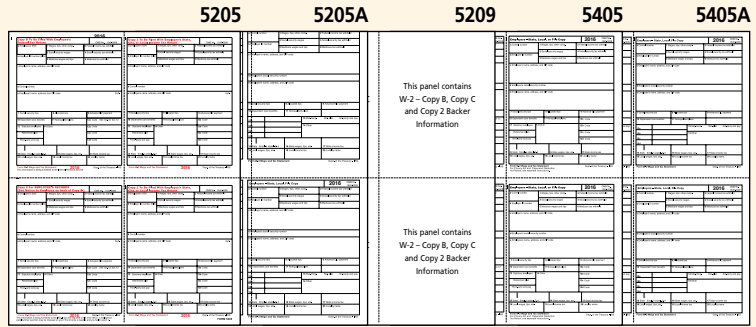
Form Description	Form # 100 Forms Per Package	Form # 500 Forms Bulk Package
W-2 Employee Copy B, C, 2 and 2 or Extra Copy	5206	5206-B
One employee per page (1 page equals 1 form)		
W-2 Employer, State, City or Local Copy 1	5406	5406-B
Four employees per page (1 page equals 1 form)		
W-2 Blank - Three Horizontal Perfs (with Backer).	5208	5208-B
One employee per page (1 page equals 1 form)		
W-2 Employee Copy B, C, 2 and 2 or Extra Copy (1 page equals 1 form)	5218	5218B
One employee per page (N-Style)		
Order By: # of Forms		# of Packages

4444-1 or 4444-2 Self-Seal – Required Envelope for Forms 5206 and 5208
 5151-1 or 5151-2 Self-Seal – Required Envelope for Form 5218
 See Page 17 for more information.



Window envelopes are designed to match our pre-printed forms. If you are using our blank forms, we recommend you request samples to ensure our window placement is compatible with your specific software program. If you are ordering envelopes for machine insertion, please call for samples.

W-2 4-Up Box Form Description	Form # 100 Forms Per Package	Form # 500 Forms Bulk Package
W-2 Employee Copy B,C,2 and 2 or Extra Copy One employee per page (1 page equals 1 form)	5205	5205-B
W-2 Employee Copy B,C,2 and 2 or Extra Copy One employee per page (P-STYLE) (1 page equals 1 form)	5205A	5205A-B
W-2 Blank - With Backer One Vertical Center Perf and One Horizontal Center Cross Perf (1 page equals 1 form)	5209	5209-B
W-2 Employer, State, City or Local Copy 1 Four employees per page (1 page equals 1 form)	5405	5405-B
W-2 Employer, State, City or Local Copy 1 Four employees per page (P-STYLE) (1 page equals 1 form)	5405A	5405A-B



Detail of Form 5205

Order By: # of Forms # of Packages

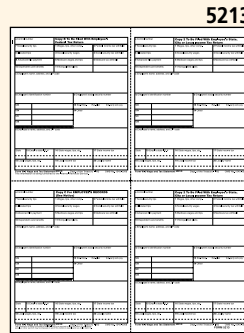
9999-1 or 9999-2 Self-Seal – Required Envelope – See Page 17 for more information

The following is one example of how to purchase 4-up forms:
 If you require the equivalent of 100 – 6 part W-2 forms, you would order:
 100 – 5201 (Copy A) 200 – 5204 (Employer, State, City or Local Copy 1)
 100 – 5205 (Copy B, C, 2 and 2 or Extra Copy)

W-2 4-Up Box Form Description	Form # 100 Forms Per Package	Form # 500 Forms Bulk Package
W-2 Employee Copy B,C,2 and 2 or Extra Copy One employee per page (T-STYLE) (1 page equals 1 form)	5213	

Order By: # of Forms

3131-1 Required Envelope – See Page 16 for more information

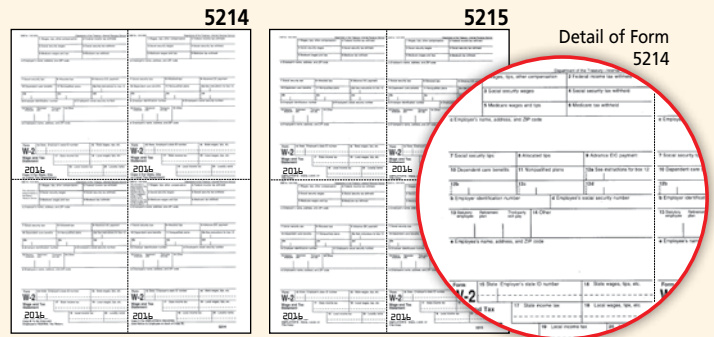


Detail of Form 5213

W-2 4-Up Box Form Description	Form # 100 Forms Per Package	Form # 500 Forms Bulk Package
W-2 Employee Copy B,C,2 and 2 or Extra Copy One employee per page (M-STYLE) (1 page equals 1 form)	5214	5214-B
W-2 Employer, State, City or Local Copy 1 Four employees per page (M-STYLE) (1 page equals 1 form)	5215	5215-B

Order By: # of Forms # of Packages

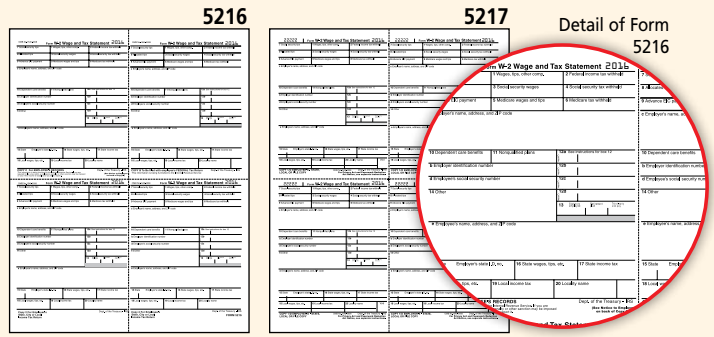
9191-1 Required Envelope – See Page 17 for more information



Detail of Form 5214

W-2 4-Up Box Form Description	Form # 100 Forms Per Package	Form # 500 Forms Bulk Package
W-2 Employee Copy B,C,2 and 2 or Extra Copy One employee per page (W-STYLE) (1 page equals 1 form)	5216	5216-B
W-2 Employer, State, City or Local Copy 1 Four employees per page (W-STYLE) (1 page equals 1 form)	5217	5217-B

Order By: # of Forms # of Packages



Detail of Form 5216

6161-1 or 6161-2 Self-Seal – Required Envelope - See Page 17 for more information

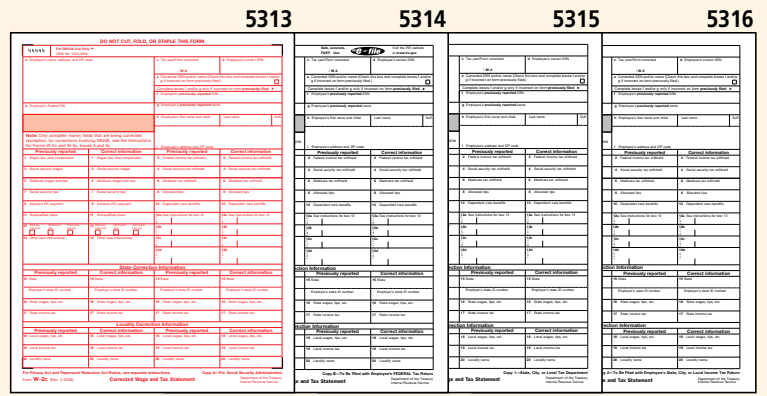
Forms for Laser Printers

W-2C Corrected Wage and Tax Statement	Form # 100 Forms Per Package	Form # 500 Forms Bulk Package
Form Description		
W2C SSA Copy A (1 page equals 1 form)	5313	5313-B
W2C Employee Copy B to be filed with federal return (1 page equals 1 form)	5314	5314-B
W2C Copy 1 State, City or Local Tax Department or Copy D For Employer (1 page equals 1 form)	5315	5315-B
W2C Employee Copy 2 to be filed with state return and/or Copy C for employee records (1 page equals 1 form)	5316	5316-B

Order By: # of Forms # of Packages

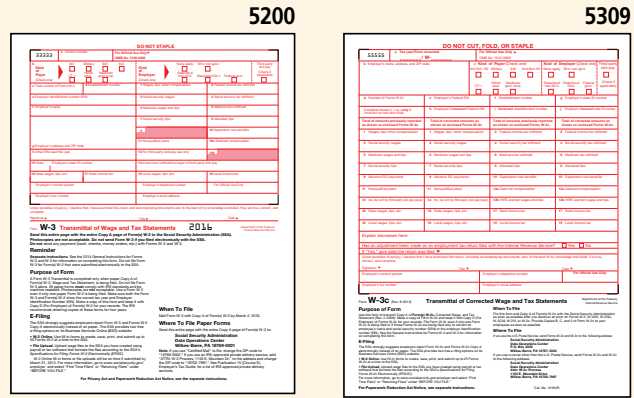
SEE CONVENIENCE SETS ON PAGE 13

Suggest using DWW2C Double Window Envelope Gum Seal. – See page 17 for more information and envelopes.



W-3 and W-3C Transmittal Forms for W-2 and W-2C	Form # 10 or 25 Forms Per Package	Form # 500 Forms Bulk Package
Form Description		
W-3 Transmittal of Income and Tax Statement Contains information for one employer.	5200	5200-B
W-3C Transmittal of Corrected Income and Tax Statement	5309	

Order By: # of Forms # of Packages



Simplify your customers' filing process. Add software to your order!

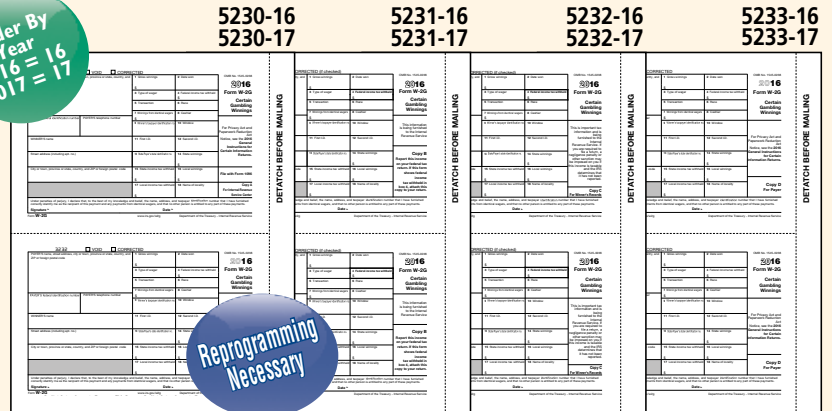
W-2G Certain Gambling Winnings	Form # 100 Forms Per Package
Form Description	
W2G Federal IRS Copy A (1 page equals 2 forms)	5230-16 5230-17
W2G Winner Copy B to be filed with federal return (1 page equals 2 forms)	5231-16 5231-17
W2G Winner Copy 2 and/or Copy C to be filed with state return and/or for winner's records (1 page equals 2 forms)	5232-16 5232-17
W2G Copy 1 For State, City or Payer File Copy D (1 page equals 2 forms)	5233-16 5233-17

Order By: # of Forms

Suggest using DWW2G Double Window Envelope Gum Seal. – See page 17 for more information and envelopes.

Form Released in December 2016

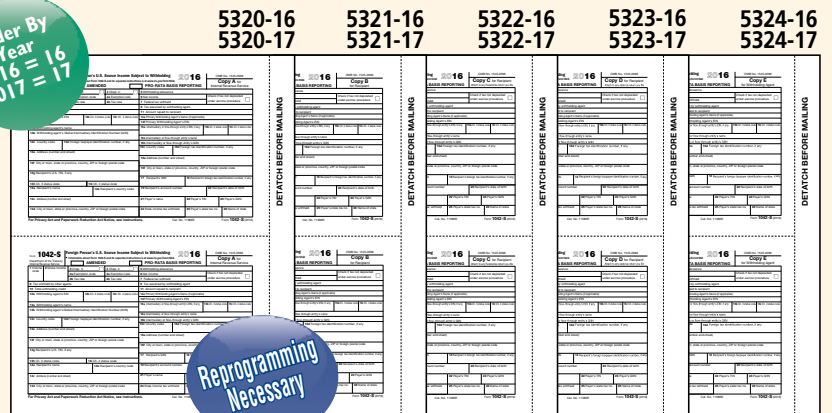
Order By Year
2016 = 16
2017 = 17



1042-S Foreign Person's U.S. Source Income	Form # 100 Forms Per Package
Form Description	
1042-S Federal IRS Copy A (1 page equals 2 forms)	5320-16 5320-17
1042-S Recipient Copy B (1 page equals 2 forms)	5321-16 5321-17
1042-S Recipient Copy C to be filed with federal return (1 page equals 2 forms)	5322-16 5322-17
1042-S Recipient Copy D to be filed with state return (1 page equals 2 forms)	5323-16 5323-17
1042-S Withholding Agent Copy E (1 page equals 2 forms)	5324-16 5324-17

Order By: # of Forms

Order By Year
2016 = 16
2017 = 17



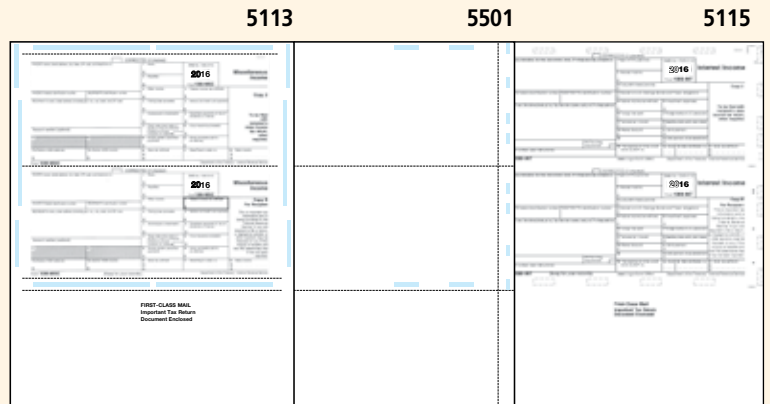
PRESSURE SEAL TAX FORMS

Forms for Laser Printers

Forms are printed on 28# white ledger bond paper using heat resistant inks. There is an adhesive around the edge of the forms that when run through a sealing machine the minuscule glue capsules burst and create a bond, thus creating a self-mailer. There are 500 forms per package.

PressureSeal Tax Forms		Form # 500 Forms Per Package
Form Description		
1099 MISC Recipient Copy 2 and B	One recipient per page (1 page equals 1 form)	5113
1099 MISC Blank	One recipient per page (1 page equals 1 form)	5501
1099 Interest Recipient Copy B	One recipient per page (1 page equals 1 form)	5115
1099 Blank 3-Up Horizontal	One recipient per page (1 page equals 1 form)	5119
1098 Mortgage Interest Copy B for Payer	One recipient per page (1 page equals 1 form)	5116
1098 "T" Copy B for Student	One recipient per page (1 page equals 1 form)	5117
1099 11" Blank 2-Up	One employee per page (1 page equals 1 form)	5229
1099-R Two Copy 2, Copy B and C	One recipient per page (1 page equals 1 form)	5177
W-2 Employee Copy B,C,2 and 2 or Extra Copy	One employee per page (1 page equals 1 form)	5220
11" W-2 Blank 4-Up Box	One employee per page (1 page equals 1 form)	5223
14" W-2 Employee Copy B,C,2 or Extra Copy	One employee per page (1 page equals 1 form)	5224
14" Horizontal W-2 Employee Copy B,C,2 or Extra Copy.	One employee per page (1 page equals 1 form)	5228
14" W-2 Blank 4-Up Box	One employee per page (1 page equals 1 form)	5225
14" W-2 Blank 4-Up Horizontal	One employee per page (1 page equals 1 form)	5227
14" Horizontal 1099-R Copy B,2 and C	One recipient per page (1 page equals 1 form)	5503
14" 1099-R 4-Up Box	One recipient per page (1 page equals 1 form)	5504
14" 1099-R Blank 4-Up Box	One recipient per page (1 page equals 1 form)	5225R
14" Horizontal 1042-S Recipient Copy B,C,D	One recipient per page (1 page equals 1 form)	5118

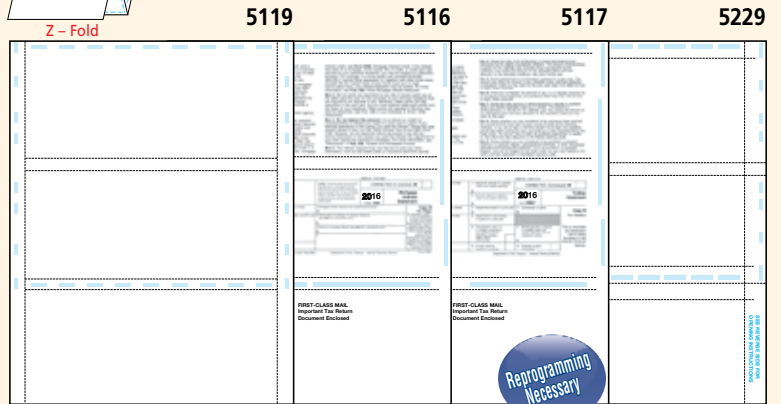
Order By: # of Forms



Z - Fold



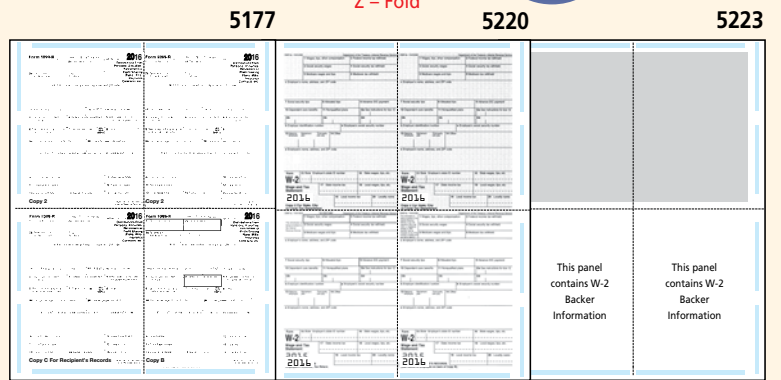
Z - Fold



Z - Fold



Z - Fold



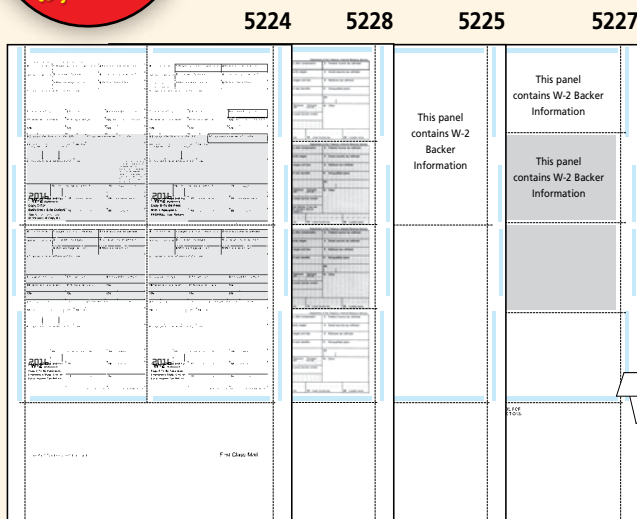
V - Fold



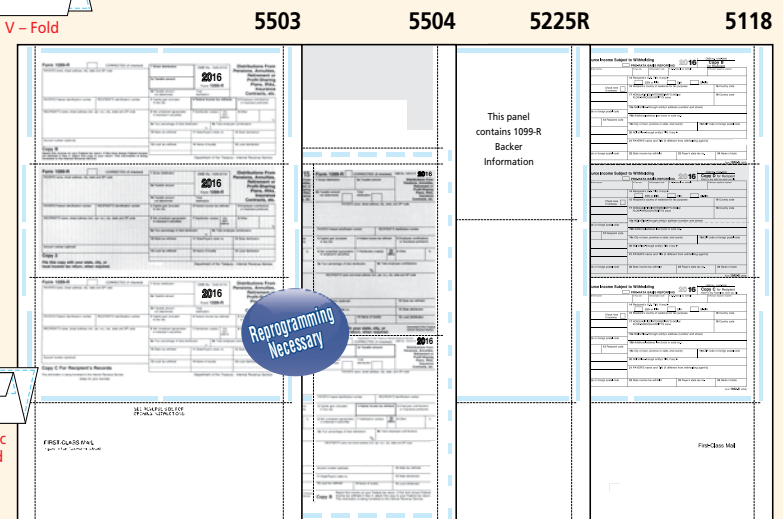
V - Fold

Simplify your customers' filing process. Add software to your order!

To view images go to www.taxformwizard.com



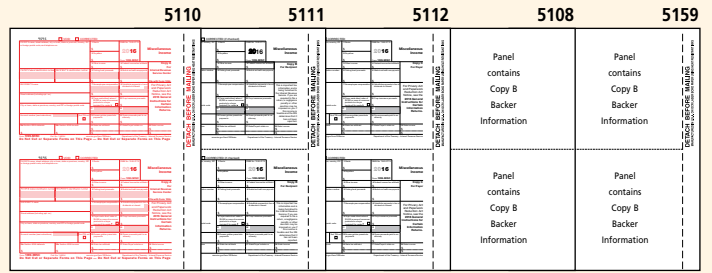
Eccentric Z - Fold



Eccentric Z - Fold

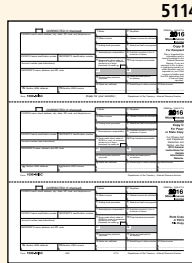
- There are three forms to each Laser 1099 Sheet (except 1099-INT, 1099-K, 1099-R, 1099-MISC, 1099-OID, 1099-B, and 1099-DIV).
- All 1099s are sold in packages of 100 forms (bulk packaging available, sold by the package). If you require a 4-part 1099 (except 1099-R), you would ORDER the following FORMS: 100 Copy A, 100 Copy B and 200 State/Copy C.
- For Convenience and Bonus Sets – see pages 13–16.

Miscellaneous		Form # 100 Forms Per Package	Form # 1000 Forms Bulk Package
Form Description			
1099-MISC Federal Copy A (1 page equals 2 forms)	5110		5110-B
1099-MISC Recipient Copy B (1 page equals 2 forms)	5111		5111-B
1099-MISC Payer and/or State Copy C (1 page equals 2 forms)	5112		5112-B
1099-MISC 2-Up Blank with backer	5108		5108B
One Horizontal Perf, No Stub (1 page equals 2 forms)			
1099-MISC 2-Up Blank with backer	5159		5159-B
One Vertical Perf and One Horizontal Perf (1 page equals 2 forms)			



Requires 7777-1 Double Window Envelope or 7777-2 Self-Seal Double Window Envelope. See Page 17 for more information.

Miscellaneous 3-Up		Form # 100 Forms Per Package	Form # 500 Forms Bulk Package
Form Description			
1099-MISC Copy B, Payer and/or State Copy C, and State Copy or Extra File Copy (1 page equals 1 form)	5114		5114-B

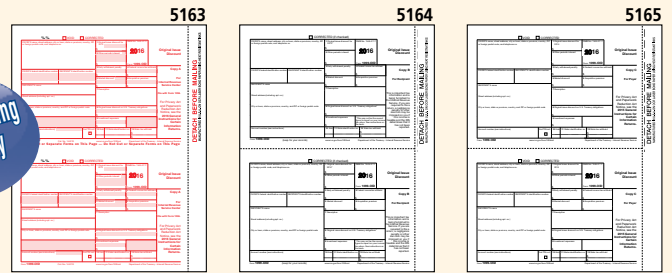


Requires 5252-1 Double Window Envelope. See Page 16 for more information.



Order By: # of Forms # of Packages

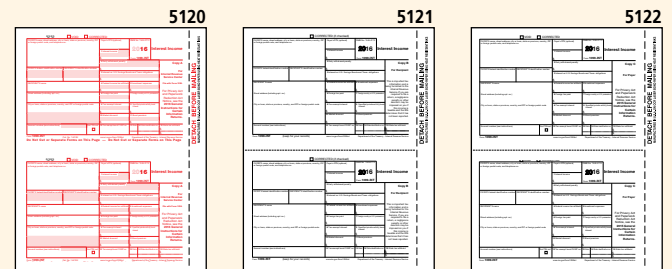
Original Issue Discount		Form # 100 Forms Per Package
Form Description		
1099-OID Federal Copy A (1 page equals 2 forms)	5163	
1099-OID Recipient Copy B (1 page equals 2 forms)	5164	
1099-OID Payer and/or State Copy C (1 page equals 2 forms)	5165	



Order By: # of Forms

Requires 7777-1 Double Window Envelope or 7777-2 Self-Seal Double Window Envelope. See Page 17 for more information.

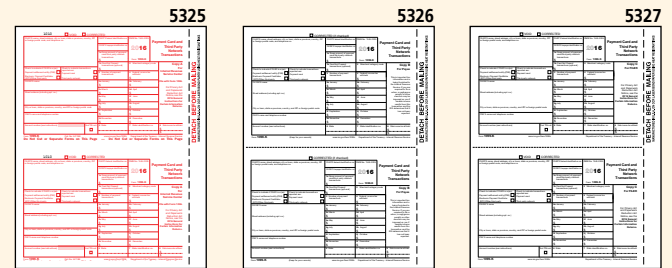
Interest		Form # 100 Forms Per Package	Form # 1000 Forms Bulk Package
Form Description			
1099-INT Federal Copy A (1 page equals 2 forms)	5120		5120-B
1099-INT Recipient Copy B (1 page equals 2 forms)	5121		5121-B
1099-INT Payer and/or State Copy C (1 page equals 2 forms)	5122		5122-B



Order By: # of Forms # of Packages

Requires 7777-1 Double Window Envelope or 7777-2 Self-Seal Double Window Envelope. See Page 17 for more information.

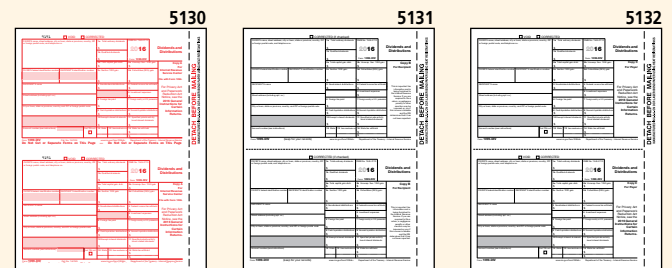
1099-K Merchant Card and 3rd Party Network Payments		Form # 100 Forms Per Package	Form # 1000 Forms Bulk Package
Form Description			
1099-K Federal Copy A (1 page equals 2 forms)	5325		5325-B
1099-K Payee Copy B (1 page equals 2 forms)	5326		5326-B
1099-K Filer Copy C (1 page equals 2 forms)	5327		5327-B



Order By: # of Forms # of Packages

Requires 7777-1 Double Window Envelope or 7777-2 Self-Seal Double Window Envelope. See Page 17 for more information.

Dividend		Form # 100 Forms Per Package	Form # 1000 Forms Bulk Package
Form Description			
1099-DIV Federal Copy A (1 page equals 2 forms)	5130		5130-B
1099-DIV Recipient Copy B (1 page equals 2 forms)	5131		5131-B
1099-DIV Payer and/or State Copy C (1 page equals 2 forms)	5132		5132-B



Order By: # of Forms # of Packages

Requires 7777-1 Double Window Envelope or 7777-2 Self-Seal Double Window Envelope. See Page 17 for more information.

- To ensure compatibility with your laser printer, please request samples.
- Window envelopes are designed to match our pre-printed forms. If you are using our blank forms, we recommend you request samples to ensure our window placement is compatible with your specific software program. If you are ordering envelopes for machine insertion, please call for samples.

Proceeds from Real Estate Transactions		
Form Description	Form # 100 Forms Per Package	Form # 1500 Forms Bulk Package
1099-S Federal Copy A (1 page equals 3 forms)	5160	5160-B
1099-S Transferor Copy B (1 page equals 3 forms)	5161	5161-B
1099-S Filer and/or State Copy C (1 page equals 3 forms)	5162	5162-B
Order By: # of Forms # of Packages		

5160

5161

5162

Broker		
Form Description	Form # 100 Forms Per Package	
1099-B Federal Copy A (1 page equals 2 forms)	5153	
1099-B Recipient Copy B (1 page equals 2 forms)	5154	
1099-B Payer and/or State Copy C (1 page equals 2 forms)	5155	
Order By: # of Forms		

5153

5154

5155

Reprogramming
Necessary

Requires 7777-1 Double Window Envelope or 7777-2 Self-Seal Double Window Envelope – See page 17 for more information.

Changes in Corporate Control and Capital Structure		
Form Description	Form # 100 Forms Per Package	
1099-CAP Federal Copy A (1 page equals 3 forms)	5197	
1099-CAP Shareholder Copy B (1 page equals 3 forms)	5198	
1099-CAP Corporation or Broker Copy C (1 page equals 3 forms)	5199	
Order By: # of Forms		

5197

5198

5199

Cancellation of Debt		
Form Description	Form # 100 Forms Per Package	
1099-C Federal Copy A (1 page equals 3 forms)	5137	
1099-C Debtor Copy B (1 page equals 3 forms)	5138	
1099-C Creditor Copy C (1 page equals 3 forms)	5139	
Order By: # of Forms		

5137

5138

5139

5 FREE W-3
Transmittal Forms
are included with
Red Copy A orders
(See Page 6
To Order More)

To view images go to
www.taxformwizard.com

Acquisition		
Form Description	Form # 100 Forms Per Package	
1099-A Federal Copy A (1 page equals 3 forms)	5146	
1099-A Borrower Copy B (1 page equals 3 forms)	5147	
1099-A Lender and/or State Copy C (1 page equals 3 forms)	5148	
Order By: # of Forms		

5146

5147

5148

Certain Government Payments		
Form Description	Form # 100 Forms Per Package	
1099-G Federal Copy A (1 page equals 3 forms)	5156	
1099-G Recipient Copy B (1 page equals 3 forms)	5157	
1099-G Payer and/or State Copy C (1 page equals 3 forms)	5158	
Order By: # of Forms		

5157

5158

All above formats (Except 1099-B) require 2222-1 Double Window Envelope or 2222-2 Self-Seal Double Window Envelope
See page 17 for more information.

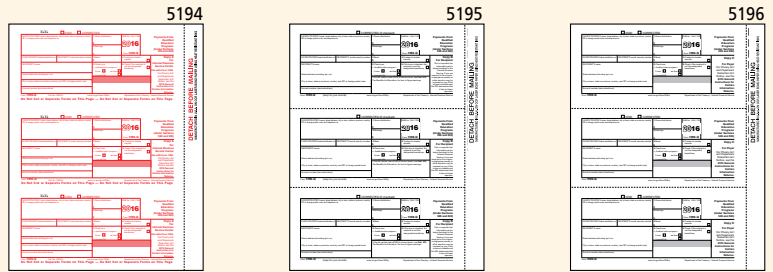
Qualified Tuition Program Payments (Under Section 529)

Form #
100 Forms
Per Package

Form Description

1099-Q Federal Copy A (1 page equals 3 forms)	5194
1099-Q Recipient Copy B (1 page equals 3 forms)	5195
1099-Q Payer and/or State Copy C (1 page equals 3 forms)	5196

Order By: # of Forms



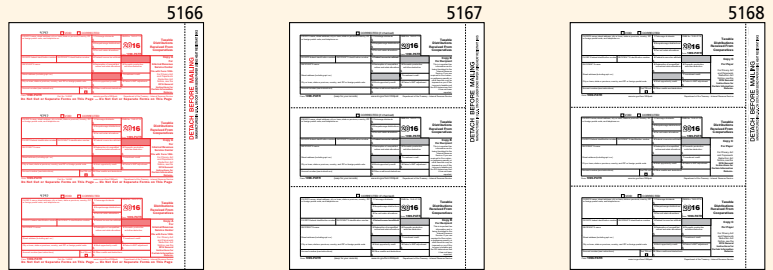
Patronage

Form #
100 Forms
Per Package

Form Description

1099-PATR Federal Copy A (1 page equals 3 forms)	5166
1099-PATR Recipient Copy B (1 page equals 3 forms)	5167
1099-PATR Payer and/or State Copy C (1 page equals 3 forms)	5168

Order By: # of Forms



Simplify your customers' filing process. Add software to your order!

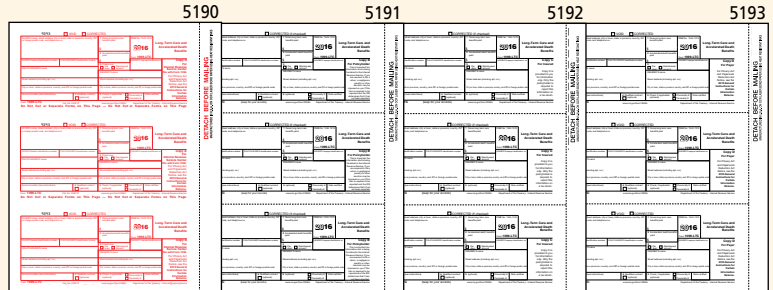
1099 LTC

Form #
100 Forms
Per Package

Form Description

1099-LTC Federal Copy A (1 page equals 3 forms)	5190
1099-LTC For Policyholder Copy B (1 page equals 3 forms)	5191
1099-LTC For Insured Copy C (1 page equals 3 forms)	5192
1099-LTC For Payer Copy D (1 page equals 3 forms)	5193

Order By: # of Forms



Envelope Available for 5191

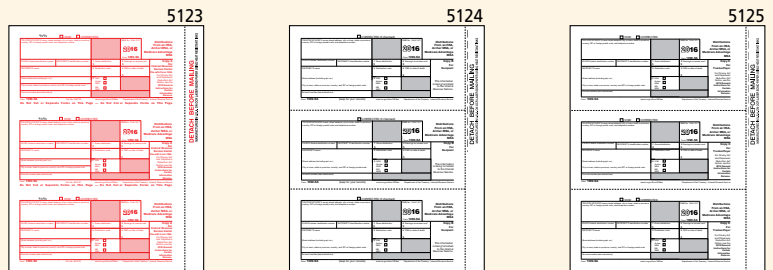
1099 SA

Form #
100 Forms
Per Package

Form Description

1099-SA Federal Copy A (1 page equals 3 forms)	5123
1099-SA Recipient Copy B (1 page equals 3 forms)	5124
1099-SA Payer and/or State Copy C (1 page equals 3 forms)	5125

Order By: # of Forms



All above formats require 2222-1 Double Window Envelope or 2222-2 Self-Seal Double Window Envelope - See page 17

Accounting Software

SOFTWARE TO CREATE NUMEROUS TAX FORMS

11014	TFP 20.16	Windows CD-ROM
12034	LaserLink 20.16	Windows CD-ROM
1203450	LaserLink XL 20.16	Windows CD-ROM
14035	ACA 20.16	Windows CD-ROM
1303-5	Account Ability	Windows CD-ROM
1303-5L	Account Ability Additional User License	

TFP, LaserLink, LaserLink XL and ACA system requirements: Windows 7, 8, 8.1 and 10, 1GHz processor or higher, 1 GB RAM, 45MB of disk space, CD-ROM drive, display optimized for 1024 x 768 screen resolution or higher, internet access for updates and e-filing process. MS Excel 2007 or newer required to e-file. Works with MOST Windows® compatible printers, recommended for use with laser printers.

Account Ability system requirements: Windows XP, 7, 8 and 10, 32MB HD, 32RAM, Laser, Inkjet, Dot Matrix printer. Networks Supported – Novell®, Citrix, Peer-Peer, Windows Server, Terminal Server, Netware and Windows 10.

Ask us about our e-file solutions and print and mail services that your customers may be looking for. Call us today at 800-482-9367.

SOFTWARE for W-2, 1099 and ACA Forms
See Page 18 for details for TFP and LaserLink and ACA

For Account Ability Software call 800-482-9367 for details.

The 1099-R has 2 forms per page. To order the equivalent of 100 6-part forms, you would ORDER the following FORMS: 100 Copy A - 5140, 100 Copy B - 5141, 200 Copy C and/or State, City or Local - 5142 and 200 Copy D and/or State, City or Local - 5143.

1099-R Retirement	Form # 100 Forms Per Package	Form # 1000 Forms Bulk Package
Form Description		
1099-R Federal Copy A (1 page equals 2 forms)	5140	5140-B
1099-R Recipient Copy B (1 page equals 2 forms)	5141	5141-B
1099-R Recipient Copy C and/or State, City or Local (1 page equals 2 forms)	5142	5142-B
1099-R Payer Copy D and/or State, City or Local (1 page equals 2 forms)	5143	5143-B
1099-R Blank – One Vertical Perf and One Center Cross Perf. (1 page equals 2 forms)	5144	5144-B

Order By: # of Forms # of Packages

1099-R Suggests 7777-1 Double Window Envelope or 7777-2 Self-Seal Double Window Envelope – See page 17 for more information

1099-R 4-Up Box	Form # 100 Forms Per Package	Form # 500 Forms Bulk Package
Form Description		
1099-R Recipient Copy B,C and 2 File Copies One Recipient per page (1 page equals 1 form)	5175	5175-B
1099-R Payer, State, Local or File Copy Four Recipients per page (1 page equals 1 form)	5176	5176-B

Order By: # of Forms # of Packages

Form 5175 Suggests 6161-1 Double Window Envelope or 6161-2 Self-Seal Double Window Envelope – See page 17 for more information

1099-R 4UP Box Pressure Seal – See Page 7

Miscellaneous Forms	Form # 100 Forms Per Package	Bulk Package
Form Description		
1099-MISC BLANK with Copy B and Copy C backers (1 page equals 1 form)	5173	5173-B (500 Forms/pkg)
1099-BLANK One Vertical Perf and Two Cross Perfs (1 page equals 3 forms)	5174	5174-B (1500 Forms/pkg)
1099-MISC, 1099-INT, 1099-R, 1099-DIV and 1099-B Blank – One Vertical Perf and One Center Cross Perf.	5144	5144-B (1000 Forms/pkg)
1099-BLANK Two Cross Perfs (1 page equals 3 forms)	5145	5145-B (1500 Forms/pkg)
1099-R Blank 4 UP One vertical center perf and one horizontal center cross perf (1 page equals 1 form)	5221	5221-B (500 Forms/pkg)
1099-R Blank 4 UP with Copy B and Copy C backers (1 page equals 1 form)	5179	5179-B (500 Forms/pkg)

Order By: # of Forms # of Packages

5174 Suggests 2222-1 Double Window Envelope or 2222-2 Self-Seal Double Window Envelope

5144 Suggests 7777-1 Double Window Envelope or 7777-2 Self-Seal Double Window Envelope

See page 17 for more information

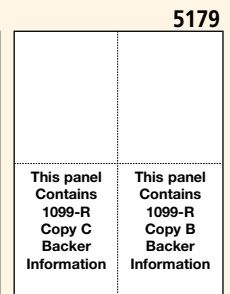
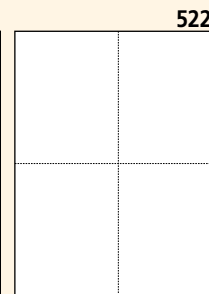
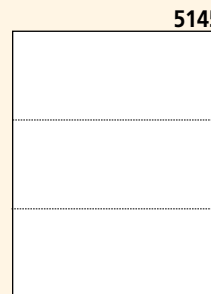
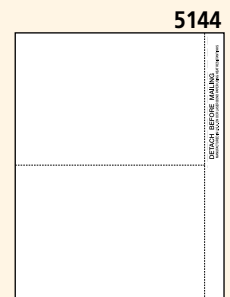
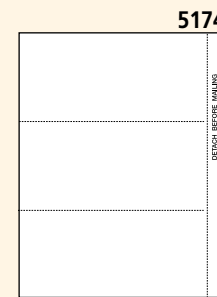
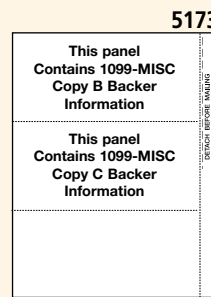
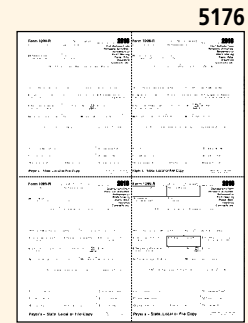
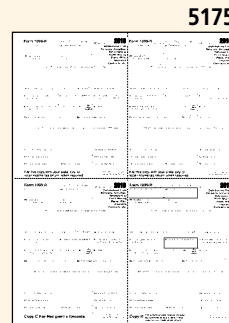
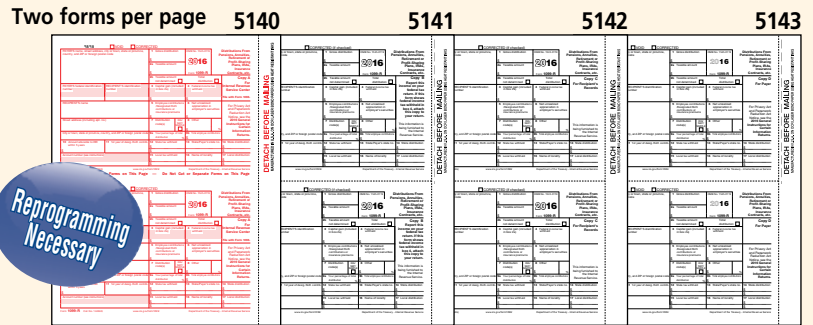
FormSmart/Jack Henry Compatible Forms	Form # 100 Forms Per Package	Form # 500 Forms Bulk Package
Form Description		
1099-BLANK Multiple Backers - No Perfs (1 page equals 1 form)	5104TAX1	5104-BTAX1
1099-BLANK Multiple Backers - No Perfs (1 page equals 1 form)	5105TAX2	5105-BTAX2
1099-BLANK Multiple Backers - No Perfs (1 page equals 1 form)	5106TAX3	5106-BTAX3

Order By: # of Forms # of Packages

Suggests 1212-1 Double Window Envelope – See page 16 for more information

1099 Transmittal Form	10 or 25 Forms Per Package	Form # 500 Forms Bulk Package
Form Description		
1096 Annual Summary/Transmittal of U.S. Information Returns	5100	5100-B

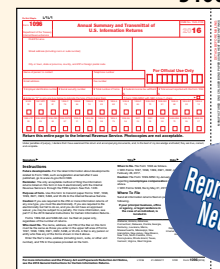
Order By: # of Forms # of Packages



5104TAX1, 5105TAX2
5106TAX3



5100



Reprogramming
Necessary

- To ensure compatibility with your laser printer, please request samples.
- Window envelopes are designed to match our pre-printed forms. If you are using our blank forms, we recommend you request samples to ensure our window placement is compatible with your specific software program. If you are ordering envelopes for machine insertion, please call for samples.

Forms for Laser Printers

1098 MTG INT

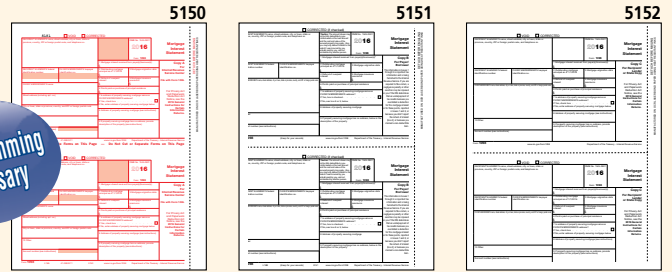
Form Description

1098 Federal IRS Copy A (1 page equals 3 forms)	5150
1098 Payer/Borrower Copy B (1 page equals 3 forms)	5151
1098 Recipient/Lender and/or State Copy C (1 page equals 3 forms)	5152

Form # 100 Forms Per Package	Form # 1500 Forms Bulk Package
------------------------------------	--------------------------------------

Order By: # of Forms # of Packages

Suggests 7777-1 Double Window Envelopes or 7777-2 Double Self-Seal Double Window - See page 17 for more information



1098-T Tuition Statement

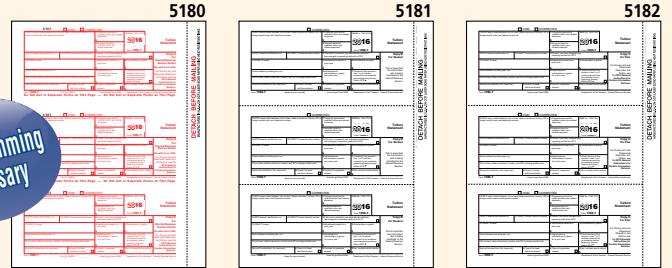
Form Description

1098-T Federal Copy A (1 page equals 3 forms)	5180
1098-T Student Copy B (1 page equals 3 forms)	5181
1098-T Filer and/or State Copy C (1 page equals 3 forms)	5182

Form # 100 Forms Per Package	Form # 1500 Forms Bulk Package
------------------------------------	--------------------------------------

Order By: # of Forms # of Packages

Suggests 7777-1 Double Window Envelopes or 7777-2 Double Self-Seal Double Window - See page 17 for more information



1098-E Student Loan Statement

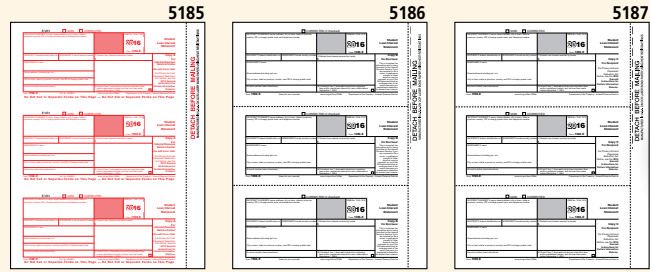
Form Description

1098-E Federal Copy A (1 page equals 3 forms)	5185
1098-E Borrower Copy B (1 page equals 3 forms)	5186
1098-E Recipient and/or State Copy C (1 page equals 3 forms)	5187

Form # 100 Forms Per Package

Order By: # of Forms

Suggests 7777-1 Double Window Envelopes or 7777-2 Double Self-Seal Double Window - See page 17 for more information



1098-C Charitable Contributions

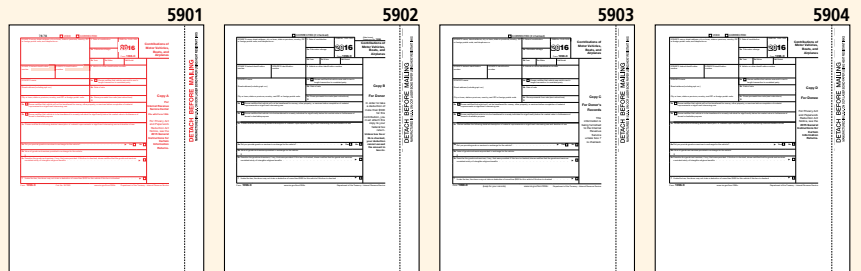
Form Description

1098-C Federal IRS Copy A (1 page equals 1 form)	5901
1098-C For Donor Copy B (1 page equals 1 form)	5902
1098-C For Donor's Records Copy C (1 page equals 1 form)	5903
1098-C For Donee Copy D (1 page equals 1 form)	5904

Form # 100 Forms Per Package

Order By: # of Forms

Suggests 7777-1 Double Window Envelopes or 7777-2 Double Self-Seal Double Window - See page 17 for more information



5498 SA

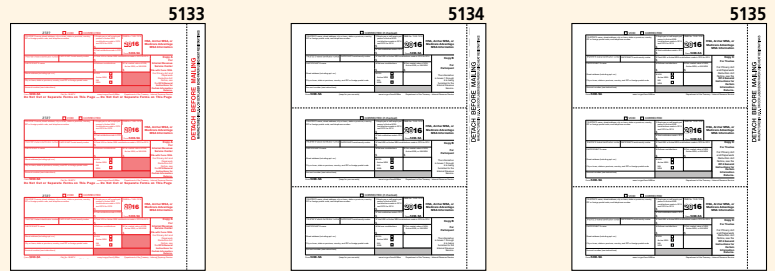
Form Description

5498-SA Federal IRS Copy A (1 page equals 3 forms)	5133
5498-SA Participant Copy B (1 page equals 3 forms)	5134
5498-SA Trustee Copy C (1 page equals 3 forms)	5135

Form # 100 Forms Per Package

Order By: # of Forms

Suggests 7777-1 Double Window Envelopes or 7777-2 Double Self-Seal Double Window - See page 17 for more information



All above formats (except 1098-C) require 2222-1 Double Window Envelope or 2222-2 Self-Seal Double Window Envelope - See page 17

5498

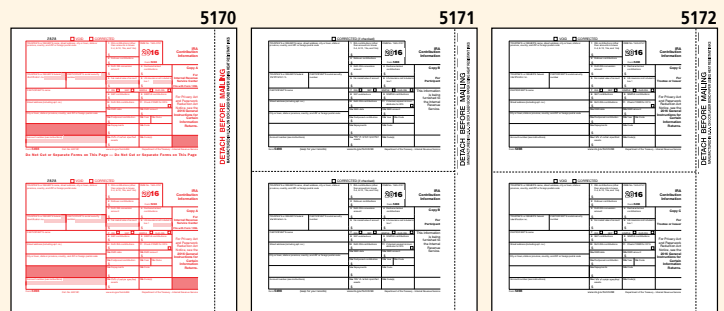
Form Description

5498 Federal IRS Copy A (1 page equals 2 forms)	5170
5498 Participant Copy B (1 page equals 2 forms)	5171
5498 Trustee or Issuer and/or State Copy C (1 page equals 2 forms)	5172

Form # 100 Forms Per Package	Form # 1000 Forms Bulk Package
------------------------------------	--------------------------------------

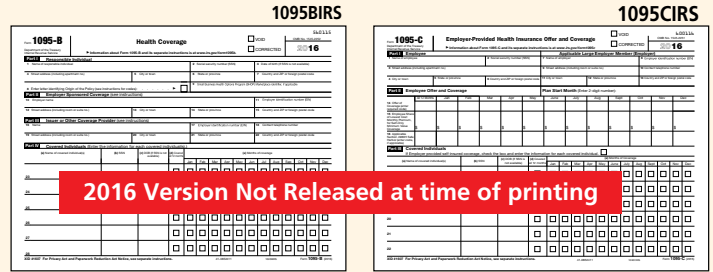
Order By: # of Forms # of Packages

Suggests 7777-1 Double Window Envelopes or 7777-2 Double Self-Seal Double Window - See page 17 for more information

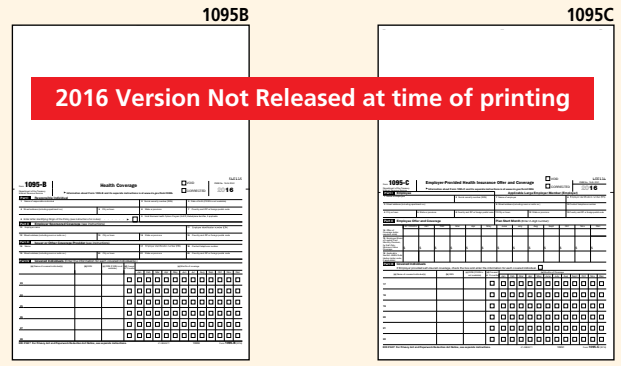


Forms for Laser Printers

Affordable Care Act Laser (IRS Landscape Format)		No Envelope available	
Form	Description	Form # 100 Forms Per Package	Form # 500 Forms Bulk Package
1095-B	ACA – Health Coverage	1095BIRS	1095BIRS500
1095-C	Employer-Provided Health Insurance Offer and Coverage	1095CIRS	1095CIRS500
		Order By: # of Forms	# of Packages



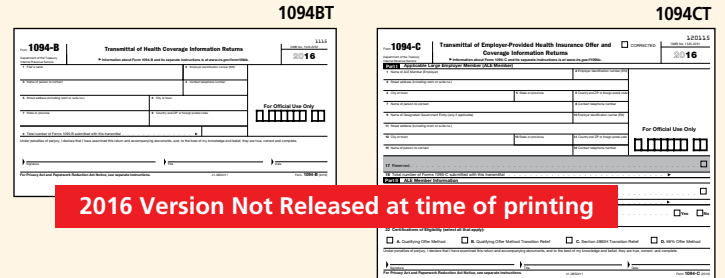
Affordable Care Act Laser (Portrait Format)		No Envelope available	
Form	Description	Form # 100 Forms Per Package	Form # 500 Forms Bulk Package
1095-B	ACA – Health Coverage	1095B	1095B500
1095-C	Employer-Provided Health Insurance Offer and Coverage	1095C	1095C500
		Order By: # of Forms	# of Packages



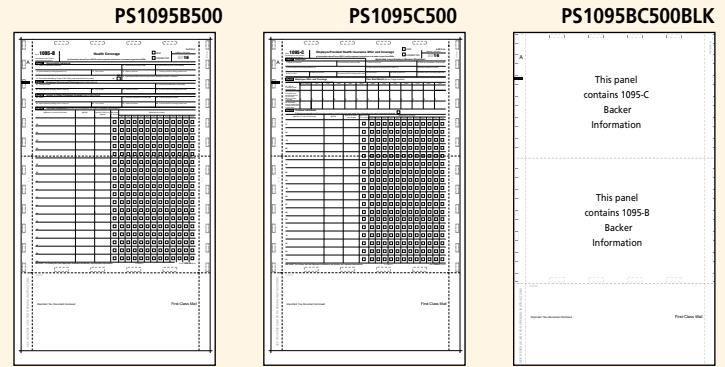
Use 7777-1 Double Window Envelope for portrait formats – See page 17

Continuation forms also available.

Summary Transmittals		No Envelope available	
Form	Description	Form # 100 Forms Per Package	Form # 500 Forms Bulk Package
1094-B	Transmittal of Health Coverage Information Returns	1094BT	1094BT500
1094-C	Transmittal of Employer-Provided Health Insurance Offer and Coverage Returns	1094CT	1094CT500
		Order By: # of Forms	# of Packages



Affordable Care Act Pressure Seal		500 Forms Bulk Package	
Form #	Description	Quantity	
PS1095B500	Form 1095-B Health Coverage 14" Pressure Seal EZ Fold	500 per pack	
PS1095C500	Form 1095-C Employer-Provided Health Insurance Offer and Coverage 14" Pressure Seal EZ Fold	500 per pack	
PS1095BC500BLK	Form 1095-B and/or 1095-C Blank w/Dual Backers, 8 1/2" x 14" Pressure Seal E-Z Fold		



Affordable Care Act Software

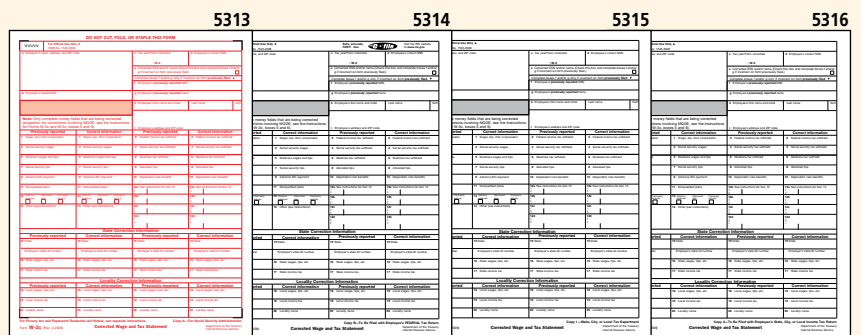
Item #	Description
14035	2016 ACA Software by ComplyRight



Convenience Sets

W-2C PRE-PACKAGED LASER SETS

Form #	Form Description
5317	4-Part Pre-Packaged Convenience Set (uncollated) Set Includes enough forms for (50 employees)
53172	4-Part Pre-Packaged Convenience Set (uncollated) Set Includes enough forms for (25 employees)
5318	6-Part Pre-Packaged Convenience Set (uncollated) Set Includes enough forms for (50 employees)
531825	6-Part Pre-Packaged Convenience Set (uncollated) Set Includes enough forms for (25 employees)





We Have Simplified the Ordering Process for Laser Forms!

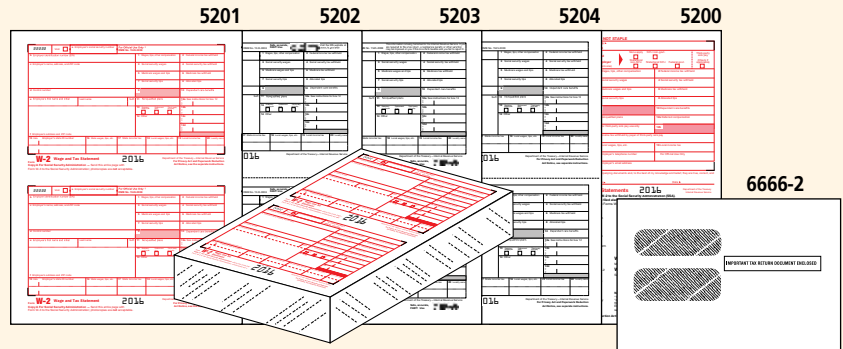
Our Convenience and Bonus Sets contain all the forms needed to process information for 25 or 50 Employees or Payee/Recipients. As an extra value, our Bonus Sets also include 25 or 50 Self-Seal envelopes required to distribute the Employee or Payee/Recipient copies.

The type of laser forms you order will depend on your software. If your software only prints the variable data on the forms, you will require pre-printed forms. If your software includes laser form files that print complete W-2 and 1099 forms copies you will require blank perforated paper. Determine your software capabilities, and order the Convenience or Bonus Pack that's right for you. Remember that the Federal Copy A of all W-2 and 1099 forms must be completed on preprinted forms with scannable ink.

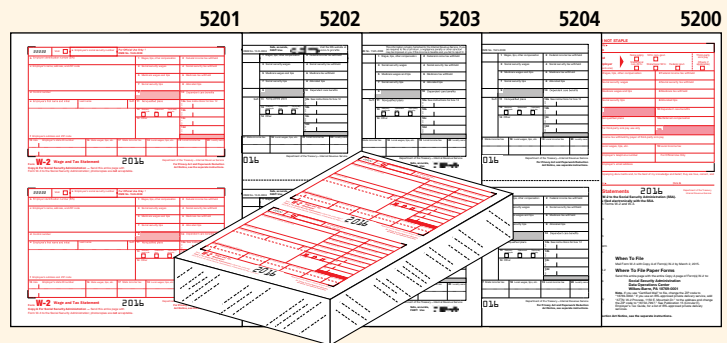
W-2 PRE-PACKAGED LASER SET

Form #	Form Description
5645	4-Part Pre-Packaged Convenience Set (uncollated) Set Includes: 50 - 5201, 50 - 5202, 50 - 5203, 50 - 5204, 3 - 5200 W-3 (50 employees)
5645E	4-Part Pre-Packaged Bonus Set (uncollated) Set Includes: 50 - 5201, 50 - 5202, 50 - 5203, 50 - 5204, 3 - 5200 W-3, 50 - 6666-2 (50 employees)
564525	4-Part Pre-Packaged Convenience Set (uncollated) Set Includes: 25 - 5201, 25 - 5202, 25 - 5203, 25 - 5204, 3 - 5200 W-3 (25 employees)
5645E25	4-Part Pre-Packaged Bonus Set (uncollated) Set Includes: 25 - 5201, 25 - 5202, 25 - 5203, 25 - 5204, 3 - 5200 W-3, 25 - 6666-2 (25 employees)
5650	6-Part Pre-Packaged Convenience Set (uncollated) Set Includes: 50 - 5201, 50 - 5202, 100 - 5203, 100 - 5204, 3 - 5200 W-3 (50 employees)
5650E	6-Part Pre-Packaged Bonus Set (uncollated) Set Includes: 50 - 5201, 50 - 5202, 100 - 5203, 100 - 5204, 3 - 5200 W-3, 50 - 6666-2 (50 employees)
565025	6-Part Pre-Packaged Convenience Set (uncollated) Set Includes: 25 - 5201, 25 - 5202, 50 - 5203, 50 - 5204, 3 - 5200 W-3 (25 employees)
5650E25	6-Part Pre-Packaged Bonus Set (uncollated) Set Includes: 25 - 5201, 25 - 5202, 50 - 5203, 50 - 5204, 3 - 5200 W-3, 25 - 6666-2 (25 employees)
5655	8-Part Pre-Packaged Convenience Set (uncollated) Set Includes: 50 - 5201, 50 - 5202, 150 - 5203, 150 - 5204, 3 - 5200 W-3 (50 employees)
5655E	8-Part Pre-Packaged Bonus Set (uncollated) Set Includes: 50 - 5201, 50 - 5202, 150 - 5203, 150 - 5204, 3 - 5200 W-3, 50 - 6666-2 (50 employees)
565525	8-Part Pre-Packaged Convenience Set (uncollated) Set Includes: 25 - 5201, 25 - 5202, 75 - 5203, 75 - 5204, 3 - 5200 W-3 (25 employees)
5655E25	8-Part Pre-Packaged Bonus Set (uncollated) Set Includes: 25 - 5201, 25 - 5202, 75 - 5203, 75 - 5204, 3 - 5200 W-3, 25 - 6666-2 (25 employees)

**OFFERING SETS
FOR 25 OR 50 EMPLOYEES
WITH OR WITHOUT
SELF-SEAL ENVELOPES**



These sets can be used with LaserLink or TFP 20.16 Software

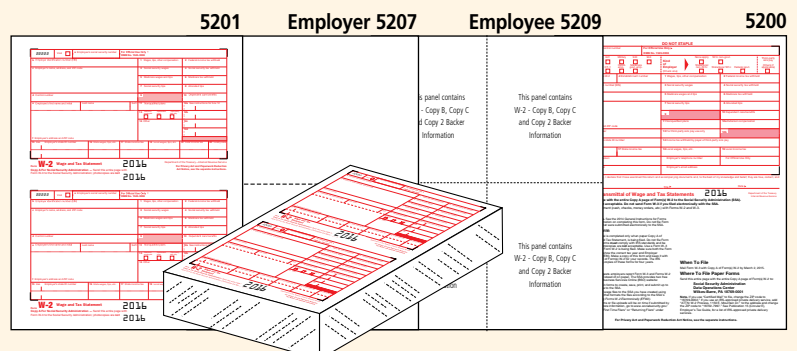


These sets can be used with LaserLink or TFP 20.16 Software

All sets with no envelopes require 6666-1 Double Window Envelope or 6666-2 Self-Seal Double Window Envelope – See page 17

W-2 LASER GENERATED SETS

Form #	Form Description
5746	6-Part Pre-Packaged Convenience Set (uncollated) Set Includes: 50 - 5201, 100 - 5207, 50 - 5209, 3 - 5200 W-3 (50 employees)
574625	6-Part Pre-Packaged Convenience Set (uncollated) Set Includes: 25 - 5201, 50 - 5207, 25 - 5209, 3 - 5200 W-3 (25 employees)



These sets can be used with LaserLink Software or TFP 20.16 Software

Additional W-2 Laser Sets Available on Page 16

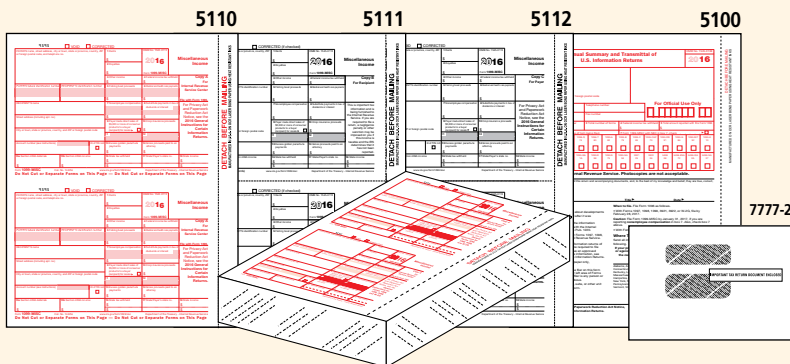
**Suggested 9999-1 Double Window Envelope
9999-2 Self-Seal Double Window Envelope – See page 17**

All quantities listed are number of forms.

Convenience & Bonus Sets

1099-MISC PRE-PACKAGED LASER SETS

Form #	Form Description
6102	3-Part Pre-Packaged Convenience Set (uncollated) Set Includes: 50 - 5110, 50 - 5111, 50 - 5112, 3 - 5100 1096 (50 employees)
6102E	3-Part Pre-Packaged Bonus Set (uncollated) Set Includes: 50 - 5110, 50 - 5111, 50 - 5112, 3 - 5100 1096, 50 - 7777-2 (50 employees)
6103	4-Part Pre-Packaged Convenience Set (uncollated) Set Includes: 50 - 5110, 50 - 5111, 100 - 5112, 3 - 5100 1096 (50 employees)
6103E	4-Part Pre-Packaged Bonus Set (uncollated) Set Includes: 50 - 5110, 50 - 5111, 100 - 5112, 3 - 5100 1096, 50 - 7777-2 (50 employees)
610325	4-Part Pre-Packaged Convenience Set (uncollated) Set Includes: 25 - 5110, 25 - 5111, 50 - 5112, 3 - 5100 1096 (25 employees)
6103E25	4-Part Pre-Packaged Bonus Set (uncollated) Set Includes: 25 - 5110, 25 - 5111, 50 - 5112, 3 - 5100 1096, 25 - 7777-2 (25 employees)
6105	5-Part Pre-Packaged Convenience Set (uncollated) Set Includes: 50 - 5110, 50 - 5111, 150 - 5112, 3 - 5100 1096 (50 employees)
610525	5-Part Pre-Packaged Convenience Set (uncollated) Set Includes: 25 - 5110, 25 - 5111, 75 - 5112, 3 - 5100 1096 (25 employees)



These sets can be used with LaserLink or TFP 20.16 Software

All sets with no envelopes require 7777-1 Double Window Envelope or 7777-2 Self-Seal Double Window Envelope – See page 17

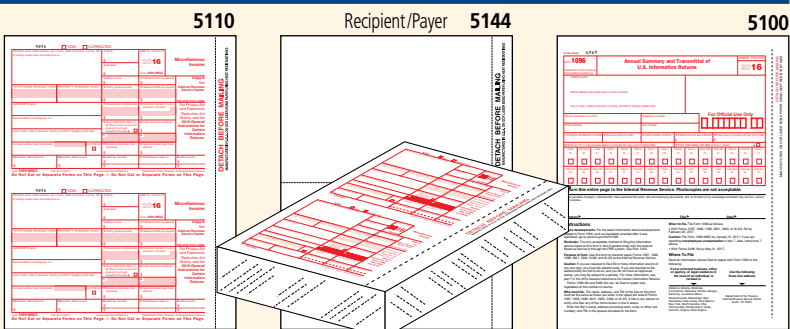
To view images go to www.taxformwizard.com

Simplify your customers' filing process. Add software to your order!

1099-MISC LASER GENERATED CONVENIENCE SETS

Form #	Form Description
6174	5-Part Pre-Packaged Convenience Set (uncollated) Set Includes: 50 - 5110, 200 - 5144, 3 - 5100 1096 (50 employees)

Suggested 7777-1 Double Window Envelope
7777-2 Self-Seal Double Window Envelope – See page 17

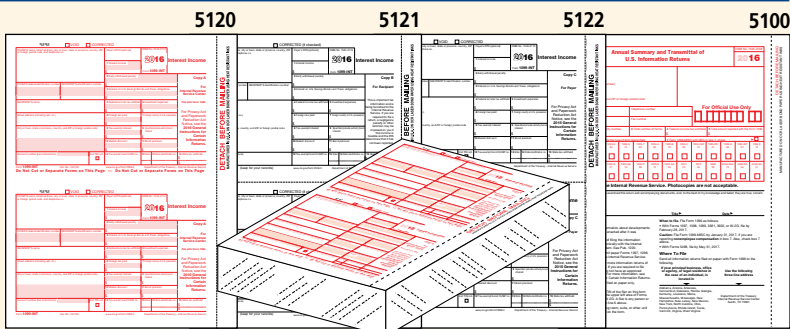


These sets can be used with LaserLink or TFP 20.16 Software

1099-INT PRE-PACKAGED LASER SETS

Form #	Form Description
6104	3-Part Pre-Packaged Convenience Set (uncollated) Set Includes: 50 - 5120, 50 - 5121, 50 - 5122, 3 - 5100 1096 (50 employees)
6106	4-Part Pre-Packaged Convenience Set (uncollated) Set Includes: 50 - 5120, 50 - 5121, 100 - 5122, 3 - 5100 1096 (50 employees)
610625	4-Part Pre-Packaged Convenience Set (uncollated) Set Includes: 25 - 5120, 25 - 5121, 50 - 5122, 3 - 5100 1096 (25 employees)

Requires 7777-1 Double Window Envelope
7777-2 Self-Seal Double Window Envelope – See page 17

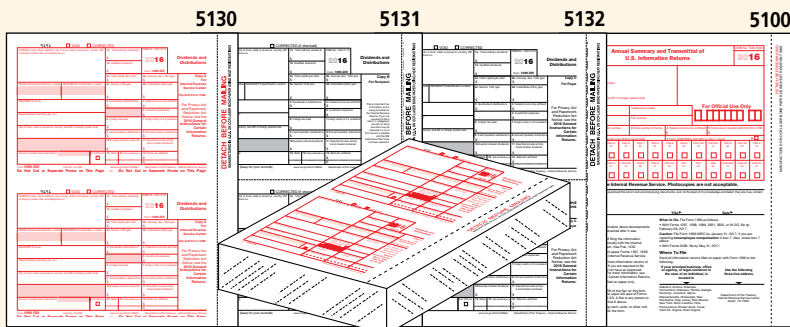


These sets can be used with LaserLink or TFP 20.16 Software

1099-DIV PRE-PACKAGED LASER SETS

Form #	Form Description
6107	4-Part Pre-Packaged Convenience Set (uncollated) Set Includes: 50 - 5130, 50 - 5131, 100 - 5132, 3 - 5100 1096 (50 employees)
610725	4-Part Pre-Packaged Convenience Set (uncollated) Set Includes: 25 - 5130, 25 - 5131, 50 - 5132, 3 - 5100 1096 (25 employees)

Requires 7777-1 Double Window Envelope
7777-2 Self-Seal Double Window Envelope – See page 17

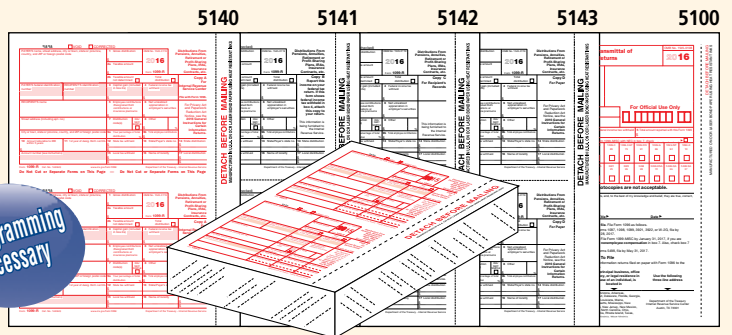


These sets can be used with LaserLink or TFP 20.16 Software

Convenience & Bonus Sets

1099-R PRE-PACKAGED LASER SET

Form #	Form Description
5644	4-Part Pre-Packaged Convenience Set (uncollated) Set Includes: 50 - 5140, 50 - 5141, 50 - 5142, 50 - 5143, 3 - 5100 1096 (50 employees)
564425	4-Part Pre-Packaged Convenience Set (uncollated) Set Includes: 25 - 5140, 25 - 5141, 25 - 5142, 25 - 5143, 3 - 5100 1096 (25 employees)
5646	6-Part Pre-Packaged Convenience Set (uncollated) Set Includes: 50 - 5140, 50 - 5141, 100 - 5142, 100 - 5143, 3 - 5100 1096 (50 employees)
564625	6-Part Pre-Packaged Convenience Set (uncollated) Set Includes: 25 - 5140, 25 - 5141, 50 - 5142, 50 - 5143, 3 - 5100 1096 (25 employees)

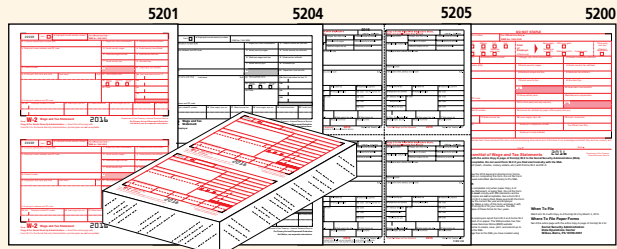


These sets can be used with LaserLink or TFP 20.16 Software

Requires 7777-1 Double Window Envelope or 7777-2 Self-Seal Double Window Envelope

W-2 PRE-PACKAGED LASER SET

Form #	Form Description
5844	4-Part W-2 4 UP Convenience Set (uncollated) Set Includes: 50 - 5201, 50 - 5204, 50 - 5205, 3 - 5200 (50 employees)
5846	6-Part W-2 4 UP Convenience Set (uncollated) Set Includes: 50 - 5201, 100 - 5204, 50 - 5205, 3 - 5200 (50 employees)
5848	8-Part W-2 4 UP Convenience Set (uncollated) Set Includes: 50 - 5201, 150 - 5204, 50 - 5205, 3 - 5200 (50 employees)



These sets can be used with LaserLink or TFP 20.16 Software

5844
5846
5848

W-2 PRINTED PRE-PACKAGED ELECTRONIC LASER SET

Form #	Form Description
5648	5-Part Pre-Packaged Convenience Set (uncollated) Set Includes: 50 - 5202, 100 - 5203, 100 - 5204 (50 employees)
5648E	5-Part Pre-Packaged Bonus Set (uncollated) Set Includes: 50 - 5202, 100 - 5203, 100 - 5204, 50 - 6666-2 (50 employees)

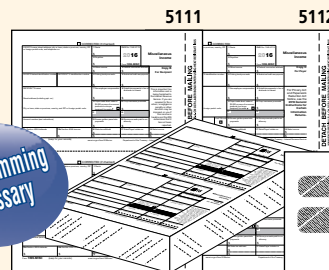


These sets can be used with LaserLink or TFP 20.16 Software

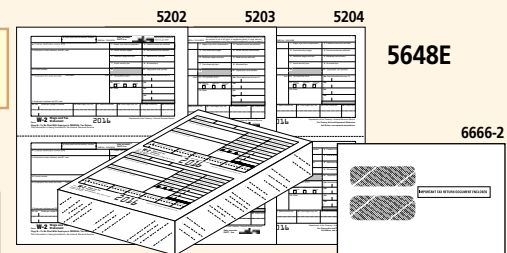
ELECTRONIC FILING SETS

1099-MISC PRINTED PRE-PACKAGED ELECTRONIC FILING SET

Form #	Form Description
6113	3-Part Pre-Packaged Convenience Set (uncollated) Set Includes: 50 - 5111, 100 - 5112 (50 employees)
6113E	3-Part Pre-Packaged Bonus Set (uncollated) Set Includes: 50 - 5111, 100 - 5112, 50 - 7777-2 (50 employees)



These sets can be used with LaserLink or TFP 20.16 Software



This set can be used with LaserLink or TFP 20.16 Software

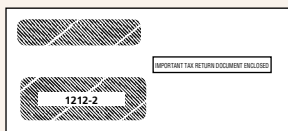
5648E

6113E

Simplify your customers' filing process. Add software to your order!

Window Envelopes

1099-BLANK Multiple Backers

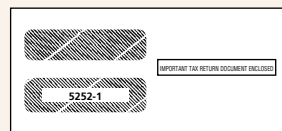


Accommodates Form 1099-Blank Laser forms with Multiple Backers 5104Tax1, 5105Tax2, and 5106Tax3.

Envelope Dimensions:
Overall Size: 3-7/8" x 9"
Top Window: 3-5/8" x 7/8"
Position: 1/2" from left
2-3/8" from bottom
Bottom Window: 3-5/8" x 1-9/16"
Position: 1/2" from left
1/2" from bottom

Form No. 1212-2 SELF-SEAL VERSION
Form No. 1212-1 GUMMED VERSION

1099-MISC 3-Up Horizontal

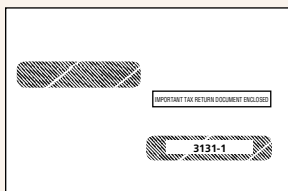


1099-MISC Double Window Envelope accommodates Form 5114.

Envelope Dimensions:
Overall Size: 3-7/8" x 8-7/8"
Top Window: 3-3/8" x 15/16"
Position: 7/16" from left
2-1/4" from bottom
Bottom Window: 3-3/8" x 13/16"
Position: 7/16" from left
3/4" from bottom

Form No. 5252-1 GUMMED VERSION

4-Up Box Laser W-2

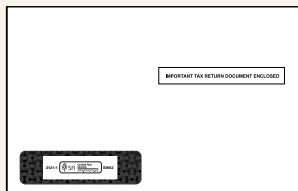


W-2 Double Window Envelope accommodates Form 5213.

Envelope Dimensions:
Overall Size: 5-5/8" x 9"
Top Window: 3-1/2" x 3/4"
Position: 7/32" from left
3-1/16" from bottom
Bottom Window: 4" x 3/4"
Position: 4-9/16" from left
1-1/8" from bottom

Form No. 3131-1 GUMMED VERSION

1042S Single Window

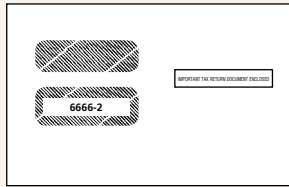


Accommodates Form 1042-5 Foreign Person's U.S. Source Income Subject to Withholding.

Envelope Dimensions:
Overall Size: 5-5/8" x 9"
Window: 3-1/2" x 1-3/8"
Position: 3/8" from left
11/16" from bottom

Form No. 2121-1 GUMMED VERSION

W-2 Window Envelope

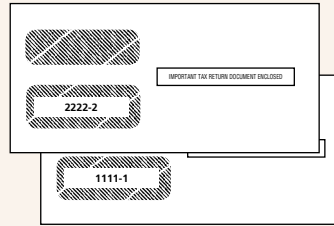


W-2 Double Window Envelope accommodates standard IRS format of continuous and laser W-2 forms.

Envelope Dimensions:
 Overall Size: 5-5/8" x 9-1/4"
 Top Window: 4" x 15/16"
 Position: 5/8" from left
 3-3/8" from bottom
 Bottom Window: 4" x 1-5/16"
 Position: 5/8" from left
 1-5/8" from bottom

*Form No. 6666-2 SELF-SEAL VERSION
 Form No. 6666-1 GUMMED VERSION

1099 Window Envelopes

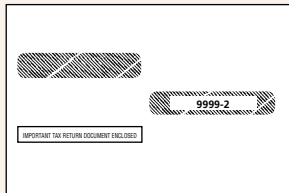


Accommodates continuous and laser 1099, 1098 and W-2G forms (except Form 1098C, 1099MISC, 1099INT, 1099R, 1099B, 1099K and 1099DIV).

Envelope Dimensions:
 Overall Size: 3-7/8" x 8-3/8"
 Top Window: 3-3/8" x 7/8"
 Position: 1/2" from left
 2-1/4" from bottom
 Bottom Window: 3-3/8" x 1-1/16"
 Position: 1/2" from left
 11/16" from bottom

*Form No. 2222-2 SELF-SEAL VERSION
 Form No. 2222-1 GUMMED VERSION
 Form No. 1111-1 Single Window GUMMED VERSION
 Form No. DWW2G DIAGONAL SEAM - FITS W2G FORM

4-Up Box Laser W-2

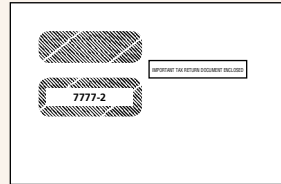


W-2 Double Window Envelope accommodates Form 5205, 5205A and 5209.

Envelope Dimensions:
 Overall Size: 5-5/8" x 9"
 Top Window: 3-7/8" x 5/8"
 Position: 5/16" from left
 3-9/16" from bottom
 Bottom Window: 3-7/8" x 3/4"
 Position: 4-1/2" from left
 2-1/2" from bottom

*Form No. 9999-2 SELF-SEAL VERSION
 Form No. 9999-1 GUMMED VERSION
 Form No. DW45D GUMMED VERSION, DIAGONAL SEAM

1099 2-Up Double Window



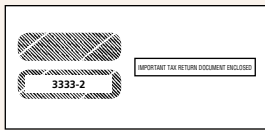
Double Window Envelope accommodates continuous and laser 1098C, 1099MISC, 1099R, 1099B, 1099K, 1099DIV, 5498 and 1099INT.

Envelope Dimensions:
 Overall Size: 5-5/8" x 9"
 Top Window: 3-3/8" x 1-1/8"
 Position: 1/2" from left
 3-3/4" from bottom
 Bottom Window: 3-3/8" x 1-7/16"
 Position: 1/2" from left
 1-1/2" from bottom

*Form No. 7777-2 SELF-SEAL VERSION
 Form No. 7777-1 GUMMED VERSION
 Form No. DWMRD GUMMED VERSION, DIAGONAL SEAM

Window envelopes are designed to match our pre-printed forms. If you are using our blank forms, we recommend you request samples to insure our window placement is compatible with your specific software program. If you are ordering envelopes for machine insertion, please call for samples.

3-Up Horizontal Laser W-2

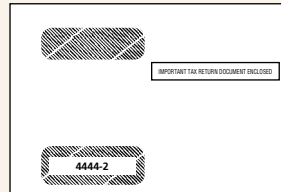


Double Window W-2 Laser 3-Up accommodates Form 5210 and 5211.

Envelope Dimensions:
 Overall Size: 3-7/8" x 8-1/2"
 Top Window: 3-1/4" x 3/4"
 Position: 3/8" from left
 2-7/32" from bottom
 Bottom Window: 3-1/4" x 13/16"
 Position: 3/8" from left
 1" from bottom

*Form No. 3333-2 SELF-SEAL VERSION
 Form No. 3333-1 GUMMED VERSION

4-Up Horizontal Laser W-2

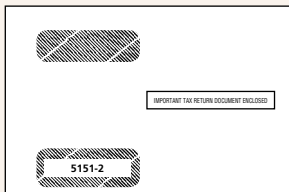


Double Window W-2 Laser 4-Up Horizontal accommodates Form 5206 and 5208.

Envelope Dimensions:
 Overall Size: 5-5/8" x 9"
 Top Window: 3-3/8" x 3/4"
 Position: 3/8" from left
 4-1/4" from bottom
 Bottom Window: 3-3/8" x 7/8"
 Position: 3/8" from left
 5/8" from bottom

*Form No. 4444-2 SELF-SEAL VERSION
 Form No. 4444-1 GUMMED VERSION
 Form No. DW387D GUMMED VERSION, DIAGONAL SEAM

4-Up Horizontal Laser W-2

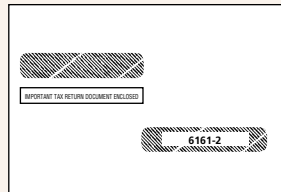


W-2 Double Window Envelope accommodates Form 5218.

Envelope Dimensions:
 Overall Size: 5-5/8" x 9"
 Top Window: 3-3/4" x 3/4"
 Position: 5/16" from left
 4-3/16" from bottom
 Bottom Window: 3-3/4" x 3/4"
 Position: 5/16" from left
 11/16" from bottom

*Form No. 5151-2 SELF-SEAL VERSION
 Form No. 5151-1 GUMMED VERSION

4-Up Box Laser W-2 & Box Laser 1099R



Double Window Envelope accommodates W-2 Form 5216 and 1099-R Form 5175.

Envelope Dimensions:
 Overall Size: 5-5/8" x 9"
 Top Window: 3-7/8" x 5/8"
 Position: 5/8" from left
 3-1/4" from bottom
 Bottom Window: 3-7/8" x 11/16"
 Position: 4-3/8" from left
 1-1/8" from bottom

*Form No. 6161-2 SELF-SEAL VERSION
 Form No. 6161-1 GUMMED VERSION
 Form No. DW4MWD GUMMED VERSION, DIAGONAL SEAM

1099 3-Up Double Window Envelope (stub on)

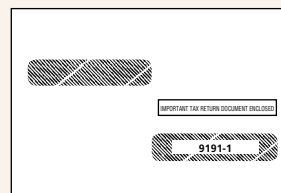


Longer Envelope accommodates continuous and laser 1099, 1098 and W-2G forms (except Forms 1099MISC, 1099R, 1099DIV, 1099B and 1099INT) with right stub being left on.

Envelope Dimensions:
 Overall Size: 3-7/8" x 9"
 Top Window: 15/16" x 3-3/8"
 Position: 3/8" from left
 2-3/8" from bottom
 Bottom Window: 1-1/8" x 3-3/8"
 Position: 3/8" from left
 3/4" from bottom

Form No. 8888-1 GUMMED VERSION

4-Up Box Laser W-2



W-2 Double Window Envelope accommodates Form 5214.

Envelope Dimensions:
 Overall Size: 5-5/8" x 9"
 Top Window: 3-5/8" x 5/8"
 Position: 5/8" from left
 3-9/16" from bottom
 Bottom Window: 3-5/8" x 11/16"
 Position: 4-3/8" from left
 1-5/16" from bottom

Form No. 9191-1 GUMMED VERSION

TFP 20.16™ LASERLINK™ ACA

SOFTWARE TO CREATE W-2,
1099 and ACA FORMS USING BLANK
and PRE-PRINTED FORMS



All titles are user friendly and guide you step-by-step through the filing process. Best of all, they each offer e-file capabilities, making filing with the IRS and SSA quicker and easier than ever.

- TFP offers the 10 most commonly filed forms (1099-MISC, DIV, INT, B, C, R, S, 1098, 1098-T, W-2) plus the 1096 and W-3 transmittal. TFP also comes with 10 FREE filings.**
- LaserLink and LaserLink XL offer the 10 most commonly filed forms plus an additional 18 forms, including ACA forms and transmittals along with 1096, W-3 and W-3C transmittals. LaserLink comes with 25 FREE filings.** LaserLink XL comes with unlimited FREE filings when e-filing through the software.
- ACA Software offers the 1095-B, 1095-C and 1094-B, 1094-C Transmittals, efile available for an additional fee. ACA also comes with 25 FREE filings.**

SOFTWARE

Title	Description	Item Number
TFP 20.16	Windows CD-ROM	11014
LaserLink 20.16	Windows CD-ROM	12034
LaserLink XL 20.16	Windows CD-ROM	1203450
ACA 20.16	Windows CD-ROM	14035

System Requirements: Windows® 7, 8, 8.1, and 10, Windows CD-ROM, 1GHz processor or higher, 1 GB RAM, 45MB of disk space, CD-ROM drive, display optimized for 1024 x 768 screen resolution or higher, internet access for updates and e-filing process. MS Excel 2007 or newer required to e-file. Works with MOST Windows® compatible printers, recommended for use with laser printers.

FEATURES

PRINTING

- Prints on both pre-printed and blank forms
- Vertical and horizontal alignment on pre-printed forms

E-FILE

- Quick and easy process to upload your files to send to the IRS and/or SSA
- Access your e-filing information for up to 4 years on the e-file platform
- Receive email communication as your forms are e-filed and accepted by the IRS and/or SSA
- Forms available to e-file: in LaserLink, Laserlink XL and TFP: 1099-MISC, 1099-INT, 1099-DIV, 1099-B, 1099-C, 1099-R, 1099-S, 1098, 1098-T and W-2
- Forms available to e-file in ACA: 1095-B, 1095C (Transmittals are automatically created when-filing)
- Microsoft 2007 or higher, full version (I-Cloud base, Starter or Open Office will not support the e-file site)

SECURITY

- Database protection—have peace of mind knowing your data files are password protected
- SSN Masking—protect your recipients' Social Security numbers by masking the first five numbers (e.g. XXX-XX-1234)

OTHER

- Step-by-step user guides to walk you through the filing process
- Templates to import your tax data into the software
- Enhanced reporting to see both payer and recipient summary and totals information

COMPATIBLE FORMS

FORM FORMS	PRE-PRINTED	BLANK
1094-B	1094BT	
1094-C	1094CT	
1095-B	1095BIRS, 1095B, 1095BC	1095BCBLK
1095-C	1095CIRS, 1095C, 1095CC	1095BCBLK
*1096	5100	
*1098	5150, 5151, 5152	5174
1098-E	5185, 5186, 5187	5174
*1098-T	5180, 5181, 5182	5174
1099-A	5146, 5147, 5148	5174
*1099-B	5153, 5154, 5155	5144, 5174
*1099-C	5137, 5138, 5139	5174
*1099-DIV	5130, 5131, 5132	5144, 5174
1099-G	5156, 5157, 5158	5174
*1099-INT	5120, 5121, 5122	5174
1099-LTC	5190, 5191, 5192, 5193	5174
*1099-MISC	5110, 5111, 5112	5144, 5174
1099-OID	5163, 5164, 5165	5174
1099-PATR	5166, 5167, 5168	5174
1099-Q	5194, 5195, 5196	5174
*1099-R	5140, 5141, 5142, 5143	5144
*1099-S	5160, 5161, 5162	5174
1099-SA	5123, 5124, 5125	5174
3921	3921A, 3921B, 3921C, 3921D	5174
3922	3922A, 3922B, 3922C	5174
5498	5170, 5171, 5172	5144
5498-SA	5133, 5134, 5135	5174
*W-2	5201, 5202, 5203, 5204, 5205, 5218 5207, 5208, 5209, 5222	
W-2C	5313, 5314, 5315, 5316	
W-2G	5230, 5231, 5232, 5233	5144
*W-3	5200	
W-3C	5309	

BONUS LASER SETS WITH ENVELOPES

W-2	5645E, 5650E, 5655E
1099-MISC	6102E, 6103E

CONVENIENCE LASER SETS

W-2	5645, 5650, 5655	5746
W-2C	5317, 5318	
1099-MISC	6102, 6103, 6105	6174
1099-INT	6104, 6106	
1099-DIV	6107	
1099-R	5644, 5646	

*Forms available in TFP 20.16, LaserLink 20.16 and LaserLink XL 20.16
**Free filings available when e-filing through the software. Extra filings available for additional fees.

5 FREE W-3
Transmittal Forms
are included with
Red Copy A orders
(See Page 29
To Order More)

The Federal Government requires that all W-2s be submitted in 11 inch segments (2 W-2s per page) to the Social Security Administration. For additional information see Pub. 15 (Circular E) and 15-A supplied by the IRS.
If filing 250 or more W-2 forms, you must file them electronically unless the IRS granted you a waiver (see special notice on page 3 under electronic requirements). W-2s are available as follows:
Continuous Carbon interleaved in 4 and 6 parts – Continuous Carbonless paper in 4, 6 and 8 parts
Twin Sets – Two wide – Self Mailers – Laser Cut Sheets

We use the IRS W-2 format, so our forms will fit the majority of software packages. However, if in doubt, please request samples.
REMEMBER: We can mail or FAX sample formats. You can also print or view samples by visiting www.taxformwizard.com

1 Wide Continuous

All plies are crimped on right and left margins. Employee plies are glued on right margin only.

Two official Forms W-2 are contained on a single page that is 8 1/2" wide by 11" deep.

W-2 FORM PARTS DESCRIPTION			
EMPLOYER'S COPIES		EMPLOYEE'S COPIES	
Copy A	For Social Security Administration	Copy B	To be filed with Employee's Federal Tax Return
Copy 1	For State, City, or Local Tax Department	Copy C	For Employee's Records
Copy D	For Employer's Records	Copy 2	To be filed with Employee's State, City or Local Income Tax Return

OVERALL SIZE -
9 1/2" x 5 1/2"
DETACHED SIZE -
8 1/2" x 5 1/2"

1-WIDE

Form #	Description/Sequence
9811-4	4 part Carbonless Copy A,B,C,1/D
9811-6	6 part Carbonless Copy A,1/D,B,C,2,1/D
9811-8	8 part Carbonless Copy A,1/D,1/D,B,C,2,2,1/D

All non-mailers on this page fit 6666-1 Double Window Envelope or 6666-2 Self-Seal Double Window Envelope. See page 17 for more information.

Simplify your customers' filing process.
Add software to your order!

Self-Mailers

No envelope needed as employee's copies are inserted in a pre-sealed envelope. Not available with Postal Indicia. If you have high-speed printers or other printers with light strike impressions, we recommend the twin set mailers found below.

OVERALL SIZE - 10 1/4" x 5 1/2" DETACHED SIZE - 8 1/2" x 5 1/2"

SELF-MAILER

Form #	Description/Sequence
7144-4	4 part Carbon Out Copy A,D: In B,C
7144-6	6 part Carbon Out Copy A,1,D: In B,C,2

W-2 "TWIN SETS" For Clearer Print Quality!

We separated our 6 and 8 part one-wide forms to make two 3-part or 4-part sets collated so the employer's and employee's forms are separated. An Employer Set and a separate Employee Set are run through the printer in two passes. This design enables the form to run on printers with limited printout positions and where legibility through 5 or more plies is a problem. The W-2 Employee Forms (7640-3, 7640-4 and 7144-5) are designed for employers who report their wage information to the SSA electronically. Mailers feature Save-A-Ply construction for maximum legibility.

EMPLOYEE FORMS (7640-3, 7640-4, 7144-5)

EMPLOYER FORMS (7600-3, 7600-4)

To view images go to www.taxformwizard.com

6-PART SET

Form #	Non Mailer
7600-3	3 part Carbonless Copy A,1/D,1/D
7640-3	3 part Carbonless Copy B,C,2

8-PART SET

Form #	Non-Mailer
7600-4	4 part Carbonless Copy A,1/D,1/D,1/D
7640-4	4 part Carbonless Copy B,C,2,2

OVERALL SIZE - 9 1/2" x 5 1/2"
DETACHED SIZE - 8 1/2" x 5 1/2"

"TWIN SET" MAILER

6-PART SET

Form #	Employee Mailer
7144-5	4 part Electronic Filing Carbon Interleaved Out Copy 1/D: In B,C,2

Non-Mailer Employee Set fits 6666-1 Double Window Envelope or 6666-2 Self-Seal Double Window Envelope
See page 17 for more information.

8888-3, 8888-4

This two-wide carbonless W-2 form was specifically designed and developed for use with all data processing equipment. It fits most wide carriage printers as well as high speed printers.

2-WIDE	
Form #	Description/Sequence
8888-3	6 part/4 ply (Left) Copy 1/D, 1/D, Blank, Blank (Right) Copy A, B, 2, C
8888-4	8 part/5 ply (Left) Copy 1/D, 1/D, 1/D, Blank, Blank (Right) Copy A, B, 2, 2, C

The image shows two versions of the 2016 W-2 Wage and Tax Statement form. On the left is the full-page view, and on the right is the detached view. The full-page view includes fields for control number, wages, taxes, and other compensation. The detached view shows the employee's name, address, and ZIP code, along with various tax fields and a section for dependent care benefits.

OVERALL SIZE - 14 1/8" x 5 1/2"

DETACHED SIZE - 13 1/8" x 5 1/2"

Requires 6666-1 Double Window Envelope or 6666-2 Self-Seal Double Window Envelope
See page 17 for more information.

SELF-MAILER	
Form #	Description/Sequence
7302-6	6 part/5 ply 2-wide Mailer Carbonless insert (Left) Dor 1, Dor 1 (Right) Out Copy A: In B, C, 2

Self-Mailers 2-Wide Continuous • No Envelopes Required

Ultimate in high-speed processing with the time and money-saving convenience of a Self-Mailer. It is available in 6 or 8 part two-wide formats, with special consideration for those who must file City as well as Federal and State withholding taxes. All of the employee forms (Federal, State and/or City and File Copies) are pre-inserted in the envelope ready for mailing!

The image shows two versions of the 2016 W-2 Wage and Tax Statement form. On the left is the full-page view, and on the right is the detached view. The full-page view includes fields for control number, wages, taxes, and other compensation. The detached view shows the employee's name, address, and ZIP code, along with various tax fields and a section for dependent care benefits.

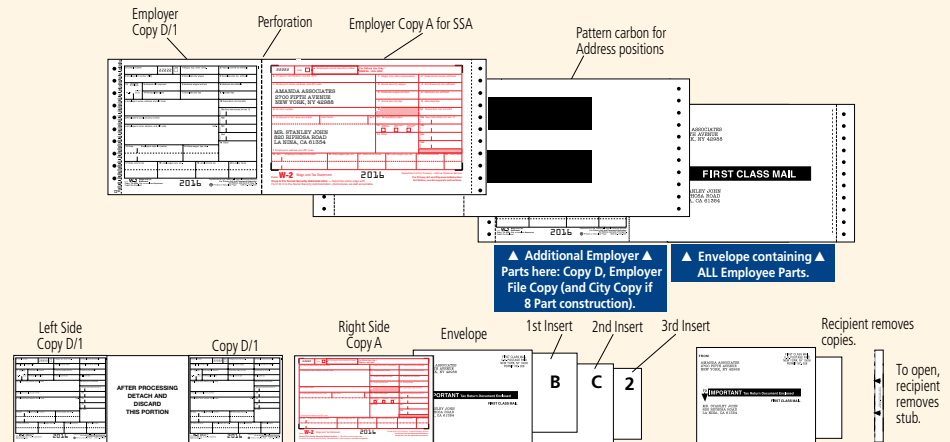
OVERALL SIZE - 14 1/8" x 5 1/2"

DETACHED SIZE - 13 1/8" x 5 1/2"

Simplify your customers' filing process.
Add software to your order!

DOUBLE WIDE SELF-MAILER CONSTRUCTION

W-2 MAILER PARTS SEQUENCE EXAMPLE FOR 7302-6	
LEFT SIDE	
OUT of Envelope	Copy D and/or Copy 1 - For Employer or For State, City, or Local Tax Dept.
IN Envelope (Inserts)	Copy D and/or Copy 1 - For Employer or For State, City, or Local Tax Dept.
RIGHT SIDE	
OUT of Envelope	Copy A - For Social Security Administration Envelope face.
IN Envelope (Inserts)	Copy B - To be filed with Employee's Federal Tax Return.
	Copy C - For Employee's Records.
	Copy 2 - To be filed with Employee's State, City, or Local Income Tax Return.



1-WIDE NON-MAILER

Employers who are electronically filing their wage information to SSA require only the forms for the employee and possibly their own State and/or File Copies. Various combinations are available in a 1-wide, carbonless non-mailer format.

OVERALL SIZE -
9 1/2" x 5 1/2"
DETACHED SIZE -
8 1/2" x 5 1/2"

NON-MAILER

Form #	Description/Sequence
7521-3	3 part Electronic Filing Copy B,C,1/D
7521-4	4 part Electronic Filing Copy B,C,2,1/D
7640-3	3 part Electronic Filing Copy B,C,2
7640-4	4 part Electronic Filing Copy B,C,2,2



All non-mailers on this page fit 6666-1 Double Window Envelope or 6666-2 Self-Seal Double Window Envelope. See page 17 for more information.

W-2 FORM PARTS DESCRIPTION

EMPLOYER'S COPIES
Copy A For Social Security Administration
Copy 1 For State, City, or Local Tax Department
Copy D For Employer's Records

EMPLOYEE'S COPIES
Copy B To be filed with Employee's Federal Tax Return
Copy C For Employee's Records
Copy 2 To be filed with Employee's State, City or Local Income Tax Return

1-WIDE SELF-MAILERS • No Envelopes Required

These W-2 Self-Mailers eliminate the SSA copy. The Cover Sheet serves as an Information Return over the envelope containing the employee forms. This Cover Sheet may be retained as a File Copy or sent to the State or Local Tax Department. The balance of the form is the envelope containing the Employee W-2 forms.

Due to backer instructions changing each year, we do not carry dateless electronic filing forms for the W-2.

For improved legibility, these self mailers feature our exclusive "Save-A-Ply" construction which uses the back of the envelope for Copy 2.

OVERALL SIZE - 10 1/2" x 5 1/2"

DETACHED SIZE - 8 1/2" x 5 1/2"

SELF-MAILERS

Form #	Description/Sequence
Carbon Insert	
7505-2	3 part Electronic Filing Out Copy 1 or D: In B,C
7505-3	4 part Electronic Filing Out Copy 1 or D: In B,C,2
7505-4	5 part Electronic Filing Out Copy 1 or D: In B,C,2,2
7144-5	4 part Electronic Filing Out Copy 1 or D: In B,C,2
Carbonless Insert	
7005-3	4 part - Electronic Filing Out Copy 1 or D: In B,C,2
7005-6	6 part - Electronic Filing Out Copy 1 or D, 1 or D: In B,C,2,2

Reporting of miscellaneous payments of \$600 or more, such as rents, royalties (\$10 or more), prizes, awards, fishing boat proceeds, medical and health payments and non-employee compensation, such as payments to non-corporate entities including attorneys, accountants, repairmen, subcontractors, salespersons, etc. (see page 35).

WHAT IS ELECTRONIC FILING: The government requires if an employer/payer has 250 or more of one form type to file with IRS/SSA they must file the Copy "A" information electronically.

NON-MAILERS

Optically Scannable Reporting

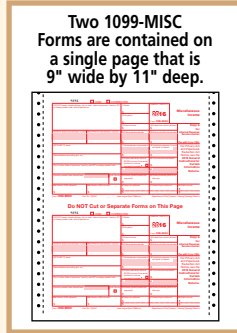
Form # Description/Sequence

7154-3	3 part Carbonless Copy A,B,C
7154-4	4 part Carbonless Copy A,State,B,C
7154-5	5 part Carbonless Copy A,State,B,2,C

Dated Electronic Filing Reporting

Form # Description/Sequence

7194-1	1 part Copy B
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For those who report Miscellaneous payments on electronic filing to the IRS.

OVERALL SIZE - 9" x 5 1/2"
DETACHED SIZE - 8" x 5 1/2"

All non-mailers on this page fit 7777-1 Double Window Envelope and 7777-2 Self-Seal Double Window Envelope. See page 17 for more information.

PARTS DESCRIPTION

1099R

- PAYER'S COPIES**
 - Copy A For Internal Revenue Service
 - Copy 1 For State, City or Local Tax Dept.
 - Copy D File Copy
- RECIPIENT'S COPIES**
 - Copy B For Recipient to file with IRS
 - Copy C For Recipient's Records
 - Copy 2 For Recipient to file with State, City or Local Tax Dept.

1099's

- PAYER'S COPIES**
 - Copy A For Internal Revenue Service
 - Copy C For State Copy
 - Copy C For Payer, Creditor, Lender or File Copy
- RECIPIENT'S COPIES**
 - Copy B Transferor, Debtor, Recipient or Borrower
 - Copy 2 For Recipient to file with State

1098

- PAYER'S COPIES**
 - Copy A For Internal Revenue Service
 - State For State Copy
 - Copy C For Recipient/Lender/Filer/Donor's Records
- RECIPIENT'S COPY**
 - Copy B For Payer/Borrower/Student/Donor
 - Copy D For Donee

5498

- PAYER'S COPIES**
 - Copy A For Internal Revenue Service
 - Copy C For Trustee or Issuer
- PARTICIPANT'S COPY**
 - Copy B For Participant

Optically Scannable Reporting

Form # Description/Sequence

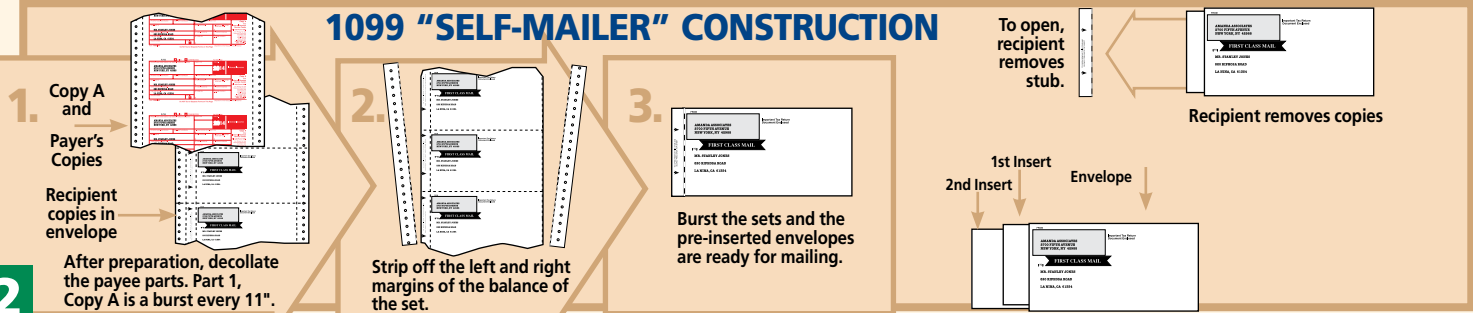
DATED	
2134-3	3 part Carbon Out Copy A,C:In B
2134-4	4 part Carbon Out Copy A,State,C:In B

SELF-MAILERS

5 FREE 1096
Transmittal Forms
are included with
Red Copy A orders
(See Page 29 to
Order More)

No Envelope Required

1099 "SELF-MAILER" CONSTRUCTION



SELF-MAILERS

ELECTRONIC FILING DATED AND DATELESS

2134-2, 8134-3

8234-3

OVERALL SIZE - 9" x 5 1/2"
DETACHED SIZE - 8" x 5 1/2"

ELECTRONIC FILING - DATED

Form # Description/Sequence

- 2134-2 2 part Carbon Out Copy C:In B
- 8134-3 3 part Carbon Out Copy C:In B,2

ELECTRONIC FILING - DATELESS

Form # Description/Sequence

- 8234-3 3 part Carbon Out Copy State or C:In B,2

Reporting all amounts of distributions from pensions, annuities, retirement or profit-sharing plans, IRAs, simplified employee pension (SEPS), insurance contracts, etc.

1099R

To view images go to www.taxformwizard.com

7159-4, 7159-6

8621-4

Reprogramming Necessary

OVERALL SIZE - 9" x 5 1/2"
DETACHED SIZE - 8" x 5 1/2"

Dated Carbonless (Scannable)

Form # Description/Sequence

- 7159-4 4 part Copy A,B,C,D
- 7159-6 6 part Copy A,1,B,C,2,D

Dated Carbonless Electronic Filing

Form # Description/Sequence

- 8621-4 4 part Copy B,C,2,D

Simplify your customers' filing process. Add software to your order!

1099-R non-mailers require 7777-1 Double Window Envelope or 7777-2 Self-Seal Double Window Envelope - See Page 17

Optically Scannable. No Envelope Required.

7139-4

OVERALL SIZE - 9" x 5 1/2"
DETACHED SIZE - 8" x 5 1/2"

Electronic Filing. No Envelopes Required. Computer generated postal indicia available.

7149-3, 7149-4

Dated Carbon Self-Mailer

Form # Description/Sequence

- 7139-4 4 part Out Copy A,D:In B,C

Dated Carbon Electronic Filing Mailer

Form # Description/Sequence

- 7149-3 3 part Out Copy 1 or D In B,C
- 7149-4 4 part Out Copy 1 or D In B,C,2

1099R PressureSeal Form - See Page 7

1099 Dividend

5 FREE 1096 Transmittal Forms are included with Red Copy A orders (See Page 29 to Order More)

Optically Scannable Reporting

Form #	Description/Sequence
7152-3	3 part Carbonless Copy A,B,C
7152-4	4 part Carbonless Copy A, State, B,C

Dated Electronic Filing Self-Mailer

2132-2	2 part Carbon Out Copy C: In B
--------	--------------------------------

Simplify your customers' filing process. Add software to your order!

Reporting of distributions of paid dividends (including capital gains dividends) and other distributions on stock of \$10 or more; for withheld and paid foreign tax on dividends and other distributions on stock; backup Federal withholding; and paid \$600 or more as part of a liquidation.

Form 1099-DIV 7152-3, 7152-4. This form reports dividends and distributions. It includes fields for Payer's name, Recipient's name, and various types of dividends (ordinary, qualified, capital gain, etc.). It also includes sections for federal and state tax withholdings and foreign tax paid.

Form 1099-DIV 2132-2. This is a dated electronic filing self-mailer version of the 1099-DIV form. It contains the same reporting fields as the standard form but is designed for electronic filing.

OVERALL SIZE - 9" x 5 1/2" DETACHED SIZE - 8" x 5 1/2"

Non-mailers Require 7777-1 Double Window Envelope or 7777-2 Self-Seal Double Window Envelope. See page 17.

1099 INTEREST

Carbonless

Form #	Description/Sequence
7150-3	3 part Copy A,B,C
7150-4	4 part Copy A, State, B,C

Carbonless Electronic Filing Dated

7150-1	1 part Copy B
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Carbon Electronic Filing Mailer Dated

2131-2	2 part Out Copy C: In B
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Carbon Self-Mailer

2130-4	4 part Out Copy A, State, C: In B
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Form 1099-INT 7150-3, 7150-4. This form reports interest income. It includes fields for Payer's name, Recipient's name, and types of interest (ordinary, early withdrawal penalty, U.S. Savings Bonds, etc.). It also includes sections for federal and state tax withholdings and foreign tax paid.

Form 1099-INT 2130-4. This is a carbon self-mailer version of the 1099-INT form. It contains the same reporting fields as the standard form but is designed for carbonless electronic filing.

Reporting of interest payments \$10 or more to any one person, by banks, credit unions and like associations. Does not include interest on an IRA.

Form 1099-INT 7150-1. This is a dated electronic filing self-mailer version of the 1099-INT form. It contains the same reporting fields as the standard form but is designed for electronic filing.

OVERALL SIZE - 9" x 5 1/2" DETACHED SIZE - 8" x 5 1/2"

See Page 22 for sequence (parts) descriptions.

Non-mailers Require 7777-1 Double Window Envelope or 7777-2 Self-Seal Double Window Envelope. See page 17.

To view images go to www.taxformwizard.com

PROCEEDS FROM REAL ESTATE TRANSACTIONS

Used for reporting gross proceeds from the sale or exchange of real estate (all amounts). At the time of Title closing, the settlement agent (attorney, title firm, escrow agent, mortgage lender or real estate broker, depending on your area) must issue this form and present it to the seller—showing the proceeds of the transaction.

7160-4

OVERALL SIZE
9" x 3 1/2"

Requires 2222-1 – Double Window Envelope or 2222-2 – Self-Seal Double Window Envelope.
See page 17 for more information.

1099-S Real Estate Transactions	
Form #	Description/Sequence
7160-4	4 part Carbonless Copy A, State, B, C

CERTAIN GOVERNMENT PAYMENTS

7153-4

OVERALL SIZE
9" x 3 1/2"

Requires 2222-1 – Double Window Envelope or 2222-2 – Self-Seal Double Window Envelope.
See page 17 for more information.

Unemployment compensation, state and local income tax refunds, agricultural payments and taxable grants.

1099-G Certain Gov. Payments	
Form #	Description/Sequence
7153-4	4 part Carbonless Copy A, State, B, C

BROKER

7157-4

OVERALL SIZE
9" x 5 1/2"

Requires 7777-1 – Double Window Envelope or 7777-2 – Self-Seal Double Window Envelope.
See page 17 for more information.

Reporting sales or redemptions of securities, futures transactions, commodities, and barter exchange transactions (all amounts).

1099-B Broker Transactions	
Form #	Description/Sequence
7157-4	4 part Carbonless Copy A, State, B, C

ORIGINAL ISSUE DISCOUNT

7156-4

OVERALL SIZE
9" x 5 1/2"

Requires 7777-1 – Double Window Envelope or 7777-2 – Self-Seal Double Window Envelope.
See page 17 for more information.

For reporting by corporate and financial institutions where there is an original issue discount of \$10 or more.

1099-OID	
Form #	Description/Sequence
7156-4	4 part Carbonless Copy A, State, B, C

See Page 22 for sequence (parts) descriptions.

CANCELLATION OF DEBT

If a Federal Government agency, financial institution, or credit union cancels or forgives a debt of \$600 or more, this form must be provided to debtor.



1099-C Cancellation of Debt	
Form #	Description/Sequence
7184-4	4 part Carbonless Copy A, State, B, C

7184-4

PATRONAGE to Taxable Distributions Received From Cooperatives

Distributions from cooperatives to their patrons whose patronage dividends are \$10 or more. Dividends paid on cooperatives' capital stock should be reported on form 1099-DIV.

1099-PATR	
Form #	Description/Sequence
7155-4	4 part Carbonless Copy A, State, B, C

7155-4

ACQUISITION OR ABANDONMENT OF SECURED PROPERTY

Reporting information about the acquisition for abandonment of property that is security for a debt for which you are the lender (all amounts).

1099-A	
Form #	Description/Sequence
7158-4	4 part Carbonless Copy A, State, B, C

7158-4

PAYMENTS FROM QUALIFIED EDUCATION PROGRAMS (UNDER SECTION 529 AND 530)

Used for the reporting of earnings from qualified state tuition programs.

1099-Q	
Form #	Description/Sequence
7187-4	4 part Carbonless Copy A, State, B, C

7187-4

DISTRIBUTIONS FROM AN HSA, ARCHER MSA, OR MEDICARE ADVANTAGE MSA

1099-SA	
Form #	Description/Sequence
7186-4	4 part Carbonless Copy A, State, B, C

7186-4

See Page 22 for sequence (parts) descriptions.

OVERALL SIZE FOR FORMS ON THIS PAGE - 9" x 3 1/3"

Tuition Payments Statement

An eligible educational institution, such as a college or university, that receives qualified tuition and related expenses on a person's behalf must furnish this statement to them.

7170-4

Optically Scannable Reporting

Form # Description/Sequence

7170-4 4 part Carbonless
Copy A, State, B, C

To view images go to
www.taxformwizard.com

Mortgage interest (including points) received in the course of trade or business from individuals and reimbursements of overpaid interest.

1098 Mortgage Interest Statement

7168-4

2098-2

Optically Scannable Reporting

Form # Description/Sequence

7168-3 3 part Carbonless
Copy A, State, B, C
7168-4 4 part Carbonless
Copy A, State, B, C

Dated Electronic Filing Mailer

2098-2 2 part Carbon
Out Copy C: In B

See Page 22 for sequence (parts) descriptions.

Reprogramming Necessary

OVER ALL SIZE IS 9" X 5 1/2" 8" X 5 1/2"

IRA and Coverdell ESA Contribution Information

Contributions (including rollover contributions) to any individual retirement arrangement (IRA), Roth conversions, and the fair market value of the account.

Optically Scannable Reporting

Form # Description/Sequence

6098-3 3 part Carbonless Copy A,B,C

Dated Electronic Filing

Form # Description/Sequence

6098-1 1 part Copy B

Electronic Filing Mailer

Form # Description/Sequence

2298-2 2 part Dated Carbon Out Copy C:In B

OVERALL SIZE - 9" x 5 1/2"
DETACHED SIZE - 8" x 5 1/2"

6098-1

6098-3

2298-2

All non-mailer formats in this section require 7777-1 – Double Window Envelope or 7777-2 Self-Seal – Double Window Envelope. See Page 17

To view images go to www.taxformwizard.com

5498 ESA Coverdell ESA Contribution Information

Contributions, including rollover contributions, to any Coverdell ESA.

Form # Description/Sequence

6097-4 4 part Carbonless Copy A,State,B,C

6097-4

5498 SA

Form # Description/Sequence

6099-4 4 part Carbonless Copy A,State,B,C

6099-4

OVERALL SIZE - 9" x 3 1/3" DETACHED SIZE - 8" x 3 1/3"

All non-mailer formats (except 1098-C) require 2222-1 – Double Window Envelope or 2222-2 Self-Seal – Double Window Envelope. See Page 17

3921A

3921 Exercise of Stock Forms

Every corporation which in any calendar year transfers to any employee a share of stock pursuant to that employee's exercise on an incentive stock option described in section 422(b) must, for that calendar year, file Form 3921 for each transfer made during the year.

Form Description	Form # 100 Forms Per Package
3921A Federal Copy A (1 page equals 3 forms)	3921A
3921B Employee Copy B (1 page equals 3 forms)	3921B
3921C Corporation Copy C (1 page equals 3 forms)	3921C
3921D Transferor Copy D (1 page equals 3 forms)	3921D

Order By: # of Forms

Requires 2222-1 – Double Window Envelope or 2222-2 Self-Seal – Double Window Envelope. See Page 17 for more information.

3922A

3922 Transfer of Stock Forms

Every corporation which in any calendar year records, or has by its agent recorded, a transfer of the legal title of a share of stock acquired by the employee pursuant to the employee's exercise of an option granted under an employee stock purchase plan and described in section 423(c) (where the exercise price is less than 100% of the value of the stock on the date of grant, or is not fixed or determinable on the date of grant), must, for that calendar year, file Form 3922 for each transfer made during the year.

Form Description	Form # 100 Forms Per Package
3922A Federal Copy A (1 page equals 3 forms)	3922A
3922B Employee Copy B (1 page equals 3 forms)	3922B
3922C Corporation Copy C (1 page equals 3 forms)	3922C

Order By: # of Forms

1096

Reprogramming Necessary

Annual Summary and Transmittal of U.S. Information Returns Form No. 1096-2 2-Part 1-Wide Carbonless

Used to summarize and transmit to the IRS all 1099, 1098, 3921, 3922, 5498 and W-2G forms. Payers must use a separate 1096 transmittal form for each type of 1099 form.

Overall Size 9" x 11"
(8" x 11" detached)

Laser format available – See Page 11

W-3

Miscellaneous Forms

Transmittal of Income and Tax Statements Form No. 7933-2

The W-3 form is the transmittal, reconciliation and summary document that accompanies Copy A of the W-2 form when employers and other payers file these documents with the SSA.

2-Part Continuous
1-Wide Carbonless
Overall Size 9-1/2" x 11"
(8-1/2" x 11" detached)

Laser format available – See Page 6

W-2C

Statement of Corrected Income Form No. 5522-6

Used to correct errors on W-2s, W2AS, W2CM, W2GU & W2VI.

DATELESS
6-Part Continuous
1-Wide Carbonless
Overall Size 9-1/2" x 11"
(8-1/2" x 11" detached)

Suggest using DWW2C Double Window Envelope Gum Seal. – See page 17 for more information and envelopes.

Laser format available – See Page 6

W-3C

Transmittal of Corrected Income and Tax Statement Form No. 7954-2

The W-3C is the Transmittal form that accompanies copies of W-2C (form 5522-6). This form can be filed alone (without accompanying Forms W-2C) to correct an EIN or information on a previously filed W-3.

DATELESS
2-Part Continuous
1-Wide Carbonless
Overall Size 9-1/2" x 11"
(8-1/2" x 11" detached)

Laser format available – See Page 6

Miscellaneous Forms

1042S

Foreign Person's U.S. Source Income Subject to Withholding

Form No. 1042-5-16 for the year 2016
Form No. 1042-5-17 for the year 2017

Form No. 1042-5D-16 for the year 2016
Form No. 1042-5D-17 for the year 2017

Dateless

Dated

Pressure Seal Form Available See Page 7

Reprogramming Necessary

Order By Year 2016 = 16 2017 = 17

Overall Size: 9" x 5-1/2"
(8" x 5-1/2" detached)

Laser format available - See Page 6

Fits 2121-1 Single Window Envelope. See page 16.

W-4 Employee's Withholding Allowance Certificate

Employers are required to furnish W-4 Certificates to all new employees. This form incorporates IRS instructions to employees for filing exemption allowances.

8-1/2" x 11" 20# bond
instructions detach providing
8-1/2" x 4-1/2" file copy
retained by employer

Form No. 1020-16 for the year 2016
Form No. 1020-17 for the year 2017

W-9 Payer's Request for Taxpayer Identification Number

Laser Format

Form W-9 is used by payers required to file information returns (for example - income paid, real estate transactions, mortgage interest, acquisition or abandonment of debt, or contributions made to an IRA) with the IRS to get the payee's correct Taxpayer Identification Number (TIN). Payees use Form W-9 to give their correct TIN to the person requesting it and, when applicable to:

1. Certify the TIN given is correct,
2. Certify payee is not subject to backup withholding, or
3. Claim exemption from backup withholding. For more information on backup withholding and requirements, obtain IRS Pub. 1679 "A Guide to Backup Withholding," or Pub. 1281 "Backup Withholding on Missing and Incorrect TINs."

8-1/2" x 11" 100 per package

Form No. 5311

I-9 Employment Eligibility Verification

The Department of Homeland Security: Requires employers to use this form to document that each new employee (both citizens and noncitizens) hired after November 6, 1986, is authorized to work in the United States. This form must be completed no later than the time of hire, which is the actual beginning of employment. Both employer and employee are required to fill in information to complete an I-9 form.

Form No. 1025-1

8-1/2" x 11" 20# bond

100 per package

To view images go to
www.taxformwizard.com

Form W-2G is used to report gambling winnings and any Federal income tax withheld on those winnings. The requirements for reporting and withholding depend on the type of gambling, the amount of the gambling winnings, and generally the ratio of the winnings to the wager. The types of gambling are grouped as follows: 1. Horse Racing, Dog Racing, Jai Alai, and Other Wagering Transactions, 2. Sweepstakes, Wagering Pools, and Lotteries, 3. Bingo, Keno, and Slot Machines.

Form W-2G 2016 Certain Gambling Winnings. Includes fields for payer's name, date won, type of wager, federal income tax withheld, and winner's name. Form number 71836-16.

71836-16

Please Specify Year When Ordering
2016 Format Available Now –
For 2017 Winnings, Format Available Approximately 1-16-17

Dated

Form #	Description/Sequence
71836-16	For year 2016
71836-17	For year 2017 6 part Carbonless Copy A, 1, B, C, 2, D

Form W-2G 2016 Certain Gambling Winnings. Includes fields for payer's name, date won, type of wager, federal income tax withheld, and winner's name. Form number 7193-6.

7193-6

Dateless

Form #	Description/Sequence
7193-6	6 part Carbonless Copy A, 1, B, C, 2, D

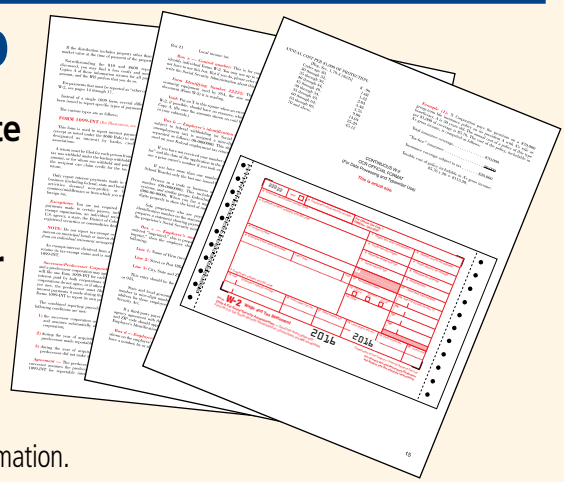
OVERALL SIZE - 8 1/2" x 5 1/2"
DETACHED SIZE - 7 1/2" x 5 1/2"

Requires DWW2G Double Window Envelope Seal. 5 1/8" x 5 1/2"



HOW TO BOOKLET CD

This booklet CD provides up-to-date instructions required to complete W-2 and 1099 Tax Forms. The information it contains will answer many of today's most commonly asked questions.



Item No. 7011CD – Call for more information.



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With our online tax reporting service, 1098, 1099 and W-2 tax forms, as well as ACA forms, can be completed and filed in minutes. The forms completed online are then filed with the IRS and SSA. In addition, the forms are printed and mailed to employees and recipients from our SOC-certified facility. The completed forms can also be downloaded and printed for file copies.

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There are no forms or envelopes to buy, no special software is required, and there is no printing. Filing W-2, 1098, 1099 and ACA forms has never been easier!

No Forms to Buy
No Software Required
No Printing or Mailing

Contact us today for more information!

2016 Additions & Deletions

	Form #	Description	Form Type
Additions	10425-17	1042S Foreign Person's US Source of Income, 5-Part, 1-Wide Carbonless "Dateless Format"	Continuous
	10425D-17	1042S Foreign Person's US Source of Income, 5-Part, 1-Wide Carbonless "Dated Format"	Continuous
	5320-17	1042-S Federal IRS Copy A	Laser
	5321-17	1042-S Recipient Copy B	Laser
	5322-17	1042-S Recipient Copy C	Laser
	5323-17	1042-S Recipient Copy D	Laser
	5324-17	1042-S Recipient Copy E	Laser
	71836-17	W-2G Certain Gambling Winnings, 6-Part, 1-Wide Carbonless	Continuous
	5230-17	W-2G Federal IRS Copy A	Laser
	5231-17	W-2G Winner Federal Copy	Laser
	5232-17	W-2G Winner State/File Copy 2/C	Laser
	5233-17	W-2G Payer's State/City and/or File Copy 1/D	Laser
	1020-17	W-4 Employee's Withholding Allowance Certificate	Laser
Deletions	10425-15	1042S Foreign Person's US Source of Income, 5-Part, 1-Wide Carbonless "Dateless Format"	Continuous
	10425D-15	1042S Foreign Person's US Source of Income, 5-Part, 1-Wide Carbonless "Dated Format"	Continuous
	5320-15	1042-S Federal IRS Copy A	Laser
	5321-15	1042-S Recipient Copy B	Laser
	5322-15	1042-S Recipient Copy C	Laser
	5323-15	1042-S Recipient Copy D	Laser
	5324-15	1042-S Recipient Copy E	Laser
	71836-15	W-2G Certain Gambling Winnings, 6-Part, 1-Wide Carbonless	Continuous
	5230-15	W-2G Federal IRS Copy A	Laser
	5231-15	W-2G Winner Federal Copy B	Laser
	5232-15	W-2G Winner State/File Copy 2/C	Laser
	5233-15	W-2G Payer's State/City and/or File Copy 1/D	Laser
	1020-15	W-4 Employee's Withholding Allowance Certificate	Laser
	60974	5498-ESA 4-Part	Continuous
	21345	1099 MISC 5-Part Mailer Carbon	Continuous
	21352	1099 PATR 2-Part, 1-Wide Dated E-file Mailer	Continuous
	26532	1099 G 2-Part, 1-Wide E-File Mailer Dated	Continuous
	71396	1099 R 6-Part, 1-Wide Carbon Mailer	Continuous
	71702	1098 T E-File Mailer	Continuous
	73018	W2 8-Part, 2-Wide Mailer Carbon	Continuous
	73016	W2 6-Part, 2-Wide Mailer Carbon	Continuous
	71442	W2 2-Part, 1-Wide Carbonless Non-Mailer	Continuous
	71512	1099 INT 2-Part, 1-Wide E-File Dated	Continuous
	71591	1099 R 1-Part Copy B E-File	Continuous
	71643	1099 MISC 3-Part, 1-Wide Carbonless E-File Copy B, 2, C	Continuous
	71674	1098 C Contribution of Vehicles 4-Part Carbonless Copy A, B, C, D	Continuous
	71681	1098 Mortgage Interest Statement 1-Part, Copy B E-File	Continuous
	71694	1098-E 4-Part, Carbonless Copy A, State, B, C	Continuous
	71701	1098-T 1-Part Copy B	Continuous

2016 IRS Form Changes & State Filing Requirements

Form	Released/ Revised	2016 Tax Form IRS Changes
1042-S	11/9/15	Reprogramming necessary. Depth of form changed to 5.2". Boxes have been moved around; three new boxes have been added and boxes 5-17 have been renumbered. There are verbiage changes, deletions and code additions to the backers. 2016 Form Completed.
1094-B	—	IRS has not yet posted the 2016 Form.
1094-C	—	IRS has not yet posted the 2016 Form.
1095-B	—	IRS has not yet posted the 2016 Form.
1095-C	—	IRS has not yet posted the 2016 Form.
1096	2/3/16	Reprogramming necessary. Both rows of the check boxes have been resized and made smaller. Check boxes for 1099-QA and 5498-QA have been added. Minor verbiage changes to instructions on both front and back to include text additions, text deletions, year updates, and date changes.
1098	10/27/15	Reprogramming necessary. Depth of form changed. This form will be changed from a 3-up to a 2-up form. Spacing for all boxes has been increased. Form has been reformatted, verbiage added and boxes added. Verbiage changes to instructions to include text additions, text deletions, year updates, and date changes.
1098-C	10/5/15	No reprogramming necessary. Minor verbiage changes on backers to include text additions, text deletions, year updates, and date changes.
1098-E	9/25/15	No reprogramming necessary. Minor verbiage changes on backers to include text additions, text deletions, year updates, and date changes.
1098-T	1/6/16	Reprogramming necessary. A check box has been added in the "Student's taxpayer identification" box (Copy A Only). Verbiage deleted from box 2. Minor verbiage changes to form and instructions to include text additions, text deletions, year updates, and date changes.
1098-Q	9/22/15	No reprogramming necessary. Minor verbiage changes on backers to include text additions, text deletions, year updates, and date changes.
1099-A	9/30/15	No reprogramming necessary. Minor verbiage changes on backers to include text additions, text deletions, year updates, and date changes.
1099-B	11/27/15	Reprogramming necessary. The "FACTA filing requirement" box has been added to the form beside the "CUSIP number" box. An additional check box "Ordinary" has been added to box 2. Year updates and added/changed verbiage throughout form. Screening deleted from box 12. Verbiage changes on backers to include text additions, text deletions, year updates, and date changes.
1099-C	9/30/15	No reprogramming necessary. Minor verbiage changes on backers to include text additions, text deletions, year updates, and date changes.
1099-CAP	10/28/15	No reprogramming necessary. Minor verbiage changes on backers to include text additions, text deletions, year updates, and date changes.
1099-DIV	9/3/15	No reprogramming necessary. Minor verbiage changes on backers to include text additions, text deletions, year updates, and date changes.
1099-G	09/25/15	No reprogramming necessary. Minor verbiage changes on backers to include text additions, text deletions, year updates, and date changes.
1099-INT	9/18/15	No reprogramming necessary. Verbiage added to box 12. Minor verbiage changes on backers to include text additions, text deletions, year updates, and date changes.
1099-K	10/23/15	No reprogramming necessary. Minor verbiage changes on backers to include text additions, text deletions, year updates, and date changes.
1099-LTC	10/26/15	No reprogramming necessary. Minor verbiage changes on backers to include text additions, text deletions, year updates, and date changes.
1099-MISC	1/6/16	No reprogramming necessary. Minor verbiage changes on backers to include text additions, text deletions, year updates, and date changes.
1099-OID	9/18/15	Reprogramming necessary. Box 8 has been made smaller to add a new Box 10 "Bond premium." Remaining boxes renumbered 11 to 13. Minor verbiage changes to the backers to include text additions, text deletions, year updates, and date changes.
1099-PATR	11/24/15	No reprogramming necessary. Minor verbiage changes on backers to include text additions, text deletions, year updates, and date changes.
1099-Q	11/17/15	No reprogramming necessary. Recipient's box verbiage changed to "taxpayer identification no." Minor verbiage changes on backers to include text additions, text deletions, year updates, and date changes.
1099-R	12/14/15	Reprogramming necessary. Box 11 was made smaller and the "FACTA filing requirement" box was added. Minor verbiage changes on backers to include text additions, text deletions, year updates, and date changes.
1099-S	11/2/15	No reprogramming necessary. Minor verbiage changes on backers to include text additions, text deletions, year updates, and date changes.
1099-SA	11/10/15	No reprogramming necessary. Minor verbiage changes on backers to include text additions, text deletions, year updates, and date changes.
5498	12/14/15	No reprogramming necessary. Minor verbiage changes on backers to include text additions, text deletions, year updates, and date changes.
5498-ESA	10/28/15	No reprogramming necessary. Minor verbiage changes on backers to include text additions, text deletions, year updates, and date changes.
5498-SA	11/10/15	No reprogramming necessary. Minor verbiage changes on backers to include text additions, text deletions, year updates, and date changes.
W-2	1/28/16	No reprogramming necessary. Minor verbiage changes on backers to include text additions, text deletions, year updates, and date changes.
W-2C	Last Rev. 8/14	
W-2G	1/5/16	Reprogramming necessary. Space has been increased in the following boxes: Payer's federal ID#, Payer's telephone#, 1 Gross winnings and 2 Date won. Space has been decreased in Signature box. Void and Corrected check boxes have been moved to the right. Minor verbiage changes to backers.
W-3	1/5/16	No reprogramming necessary. Minor verbiage changes to instructions that include year updates, and date changes.
W-3C	New Rev. 11/15	No reprogramming necessary. Minor verbiage changes to box c, h and instructions.
W-4	12/9/15	No reprogramming necessary. Year updates on front. Minor verbiage and dollar amount changes to back. Table 1 and Table 2 on back have dollar amount changes.
3921	Last Rev. 8/13	
3922	Last Rev. 8/14	
W-9	Last Rev. 12/18/2014	

W-2 and 1099 Part Requirements

W-2		1099		W-2		1099		W-2		1099	
Alabama*	6	4	Illinois	6	3	Montana	6	4	Pennsylvania*	6	4
Alaska	4	3	Indiana	6	4	Nebraska	6	3	Rhode Island	6	3
Arizona	6	4	Iowa	6	4	Nevada	4	3	South Carolina	6	4
Arkansas	6	4	Kansas	6	4	New Hampshire	4	3	South Dakota	4	3
California	6	4	Kentucky*	6	3	New Jersey	6	3	Tennessee	4	3
Colorado	6	3	Louisiana	6	4	New Mexico	6	3	Texas	4	3
Connecticut	6	4	Maine	6	3	New York	6	4	Utah	6	4
Delaware*	6	4	Maryland	6	3	New York City	6	4	Vermont	6	3
Dist. of Columbia	6	4	Massachusetts	6	4	North Carolina	6	4	Virginia	6	4
Florida	4	3	Michigan*	6	3	North Dakota	6	4	Washington	4	3
Georgia	6	4	Minnesota	6	4	Ohio*	6	3	West Virginia	6	3
Hawaii	6	4	Mississippi	6	4	Oklahoma	6	4	Wisconsin	6	4
Idaho	6	4	Missouri*	6	4	Oregon	6	4	Wyoming	4	3

*Certain cities in Alabama, Delaware, Kentucky, Michigan, Missouri, Ohio and Pennsylvania will require our 8-part all purpose form.

Form	Title	What to Report	Amounts to Report	Paper Filing Due Date	
				To IRS	To Recipient (unless indicated otherwise)
W-2	Wage and Tax Statement	Wages, tips, other compensation; social security, Medicare, withheld income taxes; and advance earned income credit (EIC) payments. Include bonuses, vacation allowances, severance pay, certain moving expense payments, some kinds of travel allowances, and third-party payments of sick pay.	See separate instructions	January 31 for Paper and e-filing	January 31
W-2G	Certain Gambling Winnings	Gambling winnings from horse racing, dog racing, jai alai, lotteries, keno, bingo, slot machines, sweepstakes, wagering pools, poker tournaments, etc.	Generally, \$600 or more; \$1,200 or more from bingo or slot machines; \$1,500 or more from keno	Last day of February*	January 31
1042-S	Foreign Person's U.S. Source Income Subject to Withholding	Income such as interest, dividends, royalties, pensions and annuities, etc., and amounts withheld under Chapter 3. Also, distributions of effectively connected income by publicly traded partnerships or nominees.	See form instructions	March 15	March 15
1094-B	Transmittal of Employer-Provided Health Insurance Offer and Coverage Information Returns	Summary transmittal record of 1095-Bs.	TBD	Insurance Carrier submits February 28*	N/A
1094-C	Transmittal of Employer-Provided Health Insurance Offer and Coverage Information Returns	Summary transmittal record of 1095-Cs	TBD	Last day of February*	N/A
1095-B	Health Coverage	Which months the insured and his or her family was covered under the plan.	TBD	Insurance Carrier submits February 28*	Insurance Carrier sends to recipients January 31
1095-C	Employer-Provided Health Insurance Offer and Coverage	Whether or not the employer offered health coverage to employees.	TBD	Last day of February*	January 31
1098	Mortgage Interest Statement	Mortgage interest (including points) and certain mortgage insurance premiums you received in the course of your trade or business from individuals and reimbursements of overpaid interest.	\$600 or more	Last day of February*	(To Payer/Borrower) January 31
1098-C	Contributions of Motor Vehicles, Boats, and Airplanes	Information regarding a donated motor vehicle, boat, or airplane	Gross proceeds of more than \$500	Last day of February*	(To Donor) 30 days from date of sale or contribution
1098-E	Student Loan Interest Statement	Student loan interest received in the course of your trade or business.	\$600 or more	Last day of February*	January 31
1098-T	Tuition Statement	Qualified tuition and related expenses, reimbursements or refunds, and scholarships or grants (optional).	See instructions	Last day of February*	January 31
1099-A	Acquisition or Abandonment of Secured Property	Information about the acquisition or abandonment of property that is security for a debt for which you are the lender.	All amounts	Last day of February*	(To Borrower) January 31
1099-B	Proceeds From Broker and Barter Exchange Transactions	Sales or redemptions of securities, futures transactions, commodities, and barter exchange transactions.	All amounts	Last day of February*	February 15
1099-C	Cancellation of Debt	Cancellation of a debt owed to a financial institution, the Federal Government, a credit union, RTC, FDIC, NCUA, a military department, the U.S. Postal Service, the Postal Rate Commission, or any organization having a significant trade or business of lending money.	\$600 or more	Last day of February*	January 31
1099-CAP	Changes in Corporate Control and Capital Structure	Information about cash, stock, or other property from an acquisition of control or the substantial change in capital structure of a corporation.	Amounts of stock or property valued at \$100 million or more	Last day of February*	(To Shareholders) January 31
1099-DIV	Dividends and Distributions	Distributions, such as dividends, capital gain distributions, or nontaxable distributions, that were paid on stock and liquidation distributions.	\$10 or more, except \$600 or more for liquidations	Last day of February*	January 31
1099-G	Certain Government Payments	Unemployment compensation, state and local income tax refunds, agricultural payments, and taxable grants.	\$10 or more for refunds and unemployment	Last day of February*	January 31
1099-INT	Interest Income	Interest income.	\$10 or more (\$600 or more in some cases)	Last day of February*	January 31
1099-LTC	Long-Term Care and Accelerated Death Benefits	Payments under a long-term care insurance contract and accelerated death benefits paid under a life insurance contract or by a viatical settlement provider	All amounts	Last day of February*	January 31
1099-MISC (Also, use to report direct sales of \$5,000 or more of consumer goods for resale.)	Miscellaneous Income	• Rent or royalty payments; prizes and awards that are not for services, such as winnings on TV or radio shows.	\$600 or more, except \$10 or more for royalties	Last day of February*	January 31
		• Payments for rental property expenses.	\$600 or more		
		• Payments to crew members by owners or operators of fishing boats including payments of proceeds from sale of catch.	All amount		
		• Section 409A income from nonqualified deferred compensation plans (NQDCs).	All amounts		
		• Payments to a physician, physicians' corporation, or other supplier of health and medical services. Issued mainly by medical assistance programs or health and accident insurance plans.	\$600 or more	January 31 for paper and e-filing	
		• Payments for services performed for a trade or business by people not treated as its employees. Examples: fees to subcontractors or directors and golden parachute payments.	\$600 or more		
		• Fish purchases paid in cash for resale.	\$600 or more		
		• Crop insurance proceeds.	\$600 or more		
• Substitute dividend and tax-exempt interest payments reportable by brokers.	\$10 or more	Last day of February*			
• Gross proceeds paid to attorneys.	\$600 or more				

*The due date is March 31, 2017 if filed electronically.

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(Example: T1234 or A123456)

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APEX – 800-354-2739

info@complyright.com
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Below is a listing of departments where each item is applicable.

ORDERS

Instantaneous/Most Efficient:

Websites: tfpdata.com
apextax.com

Email: orders@complyright.com

Fax: **TFP – 800-526-1040**
APEX – 800-600-2739

Website Orders:

To place your order directly on our website, use your account number and password. If you're not currently set up or don't remember your password — contact our customer service team at info@complyright.com to gain access to your account portal on our Website.

Orders will be in our system within minutes, and you get a confirmation email for your records.

CUSTOMER SERVICE

Websites: tfpdata.com
apextax.com

Email: **TFP – info@complyright.com**
APEX – office@complyright.com

Call: **TFP – 800-482-9367**
APEX – 800-354-2739

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ACCOUNTS RECEIVABLE

Email: credit@complyright.com

Call: **TFP – 800-482-9367**
APEX – 800-354-2739

(Request to speak with customer service.)

Remember, the following services are available:

- **Print invoices** on our website. If you need first time setup info you can contact customer service.
- You can **request copies** of your invoices or credit memos from our customer service department.
- Questions on **payments, resale certificates or accounting** can be answered by our customer service department.
- **Credit rating** – Please fax your request to: **805-981-7161**.

Need a quick answer?

You can use our website to check status on your orders!
If you need first-time setup info, you can contact customer service.

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DISTRIBUTION SERVICES





Our Commitment to the Environment

We use only sustainable forest paper for our forms and envelopes along with soy-based inks and other environmentally minded practices and procedures.

Easily prepare your tax forms by adding our software to your order!

Our proprietary software titles allow you to easily prepare your tax forms using either preprinted or blank forms. These software titles guide employers step by step through the process. They all offer e-file capabilities, making filing with the IRS and SSA quicker and easier than ever.

FEATURES

Printing

- Prints on both preprinted and blank forms
- Vertical and horizontal alignment on preprinted forms

Security

- Database protection – have peace of mind knowing data files are password-protected
- SSN masking – protect your recipients' Social Security numbers by masking the first five numbers (e.g. XXX-XX-1234)

E-File

- Quick and easy process to upload your files to the IRS and/or SSA
- Access your e-filing information for up to four years on the e-filing platform
- Receive instant communication as your forms are e-filed and accepted by the IRS

Other Electronic Filing Solutions Available

- TaxRight by ComplyRight: All-in-one kits, including forms, envelopes and software
- E-File: Simple, safe and secure cloud-based solution to electronically file returns



See page 18 for more information.

TFP 20.16

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