

# 1099 Worksheet

Use this form to provide our firm with the information needed to prepare your 1099 information returns. 1099 information returns must be prepared for individuals who are not employees

**CAUTION:** The IRS routinely verifies the name and payer ID numbers on all 1099s filed. If there are discrepancies, you will receive a notice and may be required to begin withholding. For this reason, it is important that you adhere to the following: If the payee is an individual, use the individual's Social Security Number (SSN). If the recipient operates under a business name and the business has an Employer ID Number (EIN), use the EIN. Otherwise, use the individual's name and SSN.

|                |  |               |  |
|----------------|--|---------------|--|
| Your Name:     |  |               |  |
| Your Address:  |  |               |  |
| City, ST, Zip: |  |               |  |
| Your ID #:     |  | Your Phone #: |  |

|                 |  |                   |  |
|-----------------|--|-------------------|--|
| Recipient:      |  | Amount Paid:      |  |
| Recipient ID #: |  | Payment Category: |  |
| Street Address: |  |                   |  |
| City, ST, Zip:  |  |                   |  |

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| Recipient:      |  | Amount Paid:      |  |
| Recipient ID #: |  | Payment Category: |  |
| Street Address: |  |                   |  |
| City, ST, Zip:  |  |                   |  |

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| City, ST, Zip:  |  |                   |  |

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| City, ST, Zip:  |  |                   |  |

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| Street Address: |  |                   |  |
| City, ST, Zip:  |  |                   |  |

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|-----------------|--|-------------------|--|
| Recipient:      |  | Amount Paid:      |  |
| Recipient ID #: |  | Payment Category: |  |
| Street Address: |  |                   |  |
| City, ST, Zip:  |  |                   |  |

*Payment Category = Non-Employee Comp, Dividends, Interest, Pension or Rent*