

Information Return Organizer

We need copies of all of these information returns to accurately complete your return. Information on these forms has already been reported to the IRS by the forms' issuers. **The IRS will match this information with that on your return. If these don't match, the IRS will examine your return.**

Use this form to keep track of these forms as you receive them. Then copy it, and staple copies of the forms you receive in the order below. The most common forms are highlighted in **bold**. Then bring, mail or FAX to us. [Toll-free FAX: 866-777-1964]. If you mail originals, **keep copies**.

| Reporting Form | Description | Quantity of this form you received* |
|--------------------|---|-------------------------------------|
| Most Common | | |
| Example W2 | <i>3 copies from Union Schools, 4 copies from Central Hospital</i> | 2 |
| W-2 | Wage and Tax Statement | |
| 1098 | Mortgage Interest Statement | |
| 1098E | Student Loan Interest Statement | |
| 1098T | Tuition Statement | |
| 1099MISC | Miscellaneous Income | |
| 1099B | Proceeds from Broker and Barter Exchange Transactions | |
| 1099INT | Interest Income | |
| 1099DIV | Dividends and Distributions | |
| 1099G | Certain Government Payments | |
| 1099R | Distributions from Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc. | |
| SSA-1099 | Social Security Benefits | |
| RRB-1099 | Railroad Retirement Benefits | |
| Sched. K-1 | Partner's Share of Income, Deductions, Credits, etc. | |
| Less Common | | |
| 1099C | Cancellation of Debt | |
| 1099LTC | Long Term Care and Accelerated Death Benefits | |
| 1099OID | Original Issue Discount | |
| 1099PATR | Taxable Distributions Received From Cooperatives | |
| 1099S | Proceeds From Real Estate Transactions | |
| 5498 | IRA Contribution Information | |
| 5498-ESA | Coverdell ESA Contribution Information | |
| W-2C | Corrected Wage and Tax Statement | |
| W-2G | Certain Gambling Winnings | |
| 1042S | Foreign Person's U.S. Source Income Subject to Withholding | |

*Don't count multiple copies of the same information.

CLERGY TAX & FINANCIAL SERVICES

13418 Telegraph Road, Whittier, CA 90605
 MAIL: PO BOX 4003, Santa Fe Springs, CA 90670
 E-Mail: services@clergytax.com

TEL (562)906-9906
 FAX (562)906-9903
 Toll-Free FAX: (866) 777-1964