

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: 800-352-6803]. 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	
1099K	Merchant Card and Third Party Network 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.

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