

TAX YEAR 2009

Winfiler

# 1099 & W-2 REPORTING

LASER FORMS

PRESSURE SEAL

CONTINUOUS FORMS

ENVELOPES

**NEW!** SOFTWARE

**NEW!** ONLINE FILING

## The Right Tools for Efficient 1099 & W-2 Reporting

This catalog has everything you need to gain efficiency and take the hassle out of year end reporting.

### 1099 & W-2 Forms and Envelopes

*Ideal for more than 10 recipients*

A wide variety of compliant 1099 & W-2 forms and envelopes are guaranteed compatible with your software, and adhere to all IRS and SSA regulations.

### WinfilerEZ Software

*Ideal for more than 25 recipients*

A complete software solution for efficient wage reporting, this easy-to-use system includes all types of 1099 & W-2 forms, plus transmittals, corrections, reconciliation reports and more.

### [www.EZ1099W2.com](http://www.EZ1099W2.com)

*Ideal for less than 25 recipients*

The easiest way to file the most popular 1099s and W-2s online! You enter information online and we do the rest. We e-file with the IRS or SSA, print and mail recipient copies and provide you with a file copy and confirmation of successful filing.

## Your 1099 & W-2 Partner

We're here to answer your questions and help you get the right tools for wage and information reporting.

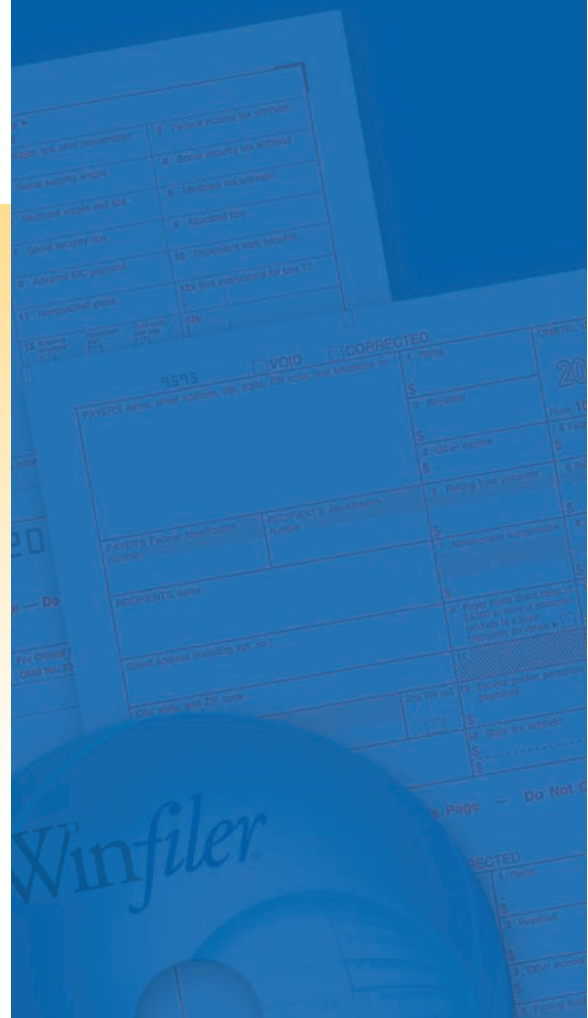
Please give us a call if you would like more information or need help selecting the right forms. Our goal is to deliver everything you need to run your business more successfully.

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### Also Available, Please Call

- 940
- 941
- 943
- 944
- 945
- More!



## How many employees do you have?

Determines how many forms you need to order; order one form/set/kit for each employee, typically in increments of 25.

## Which state(s) are you reporting to?

Determines how many parts you need and which forms you should order. See chart below for details.

## Do you need to file a copy with a city or local tax agency?

If yes, order 8 part forms (double quantity of Copy 2 forms).

## Are you filing for one company (EIN) or multiple?

If filing for one company, you need one W-3 form, which we include free with your order of W-2s. If filing for more than one company, order additional W-3 forms, one for each EIN.

## How are you printing forms?

For laser and inkjet printers, use laser forms. For dot-matrix printers or typewriters, use continuous forms. If you process a larger volume of forms, consider using pressure seal to save time.

## What type of software are you using?

Use the software compatibility chart on page 4 to determine the right forms, or request a free sample to test for data alignment.

## Do you need blank or preprinted forms?

If your software prints only the employee data, use preprinted forms. If your software prints the employee data AND the form itself (boxes, etc.), use blank perforated laser paper.

## How will you deliver forms to your employees?

Don't forget window envelopes made specifically for our forms for easy, secure mailing. For more efficient mailing, use self-seal envelopes.

## Blank Forms

Use with software that prints the actual form (boxes, headers, etc.) AND employee data in one pass.

## Preprinted Forms

Use with software that prints only the employee data.

## Continuous Forms

Use with dot-matrix printers or typewriters.

## Pressure Seal Forms

Ideal for easily printing and mailing a large volume of forms.

## Envelopes

Secure delivery for all types of W-2 formats.

## Sets & Kits

Get all the W-2 forms you need in one convenient set; some include envelopes too.

## Other Wage & Withholding Forms

Quarterly and annual reporting forms, such as 940, 941 and 945 Forms are also available; however, not shown in this catalog. Please call for details.

Form	Title	What to Report	To SSA by:	To Recipient by:
W-2	Wage & 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.	Last day of February (March 31st if e-filed)	January 31
W-2G	Certain Gambling Winnings	Gambling winnings from horse racing, dog racing, jai alai, lotteries, keno, bingo, slot machines, sweepstakes, wagering pools, etc. Generally, \$600 or more; \$1,200 or more from bingo or slot machines; \$1,500 or more from keno.	Last day of February (March 31st if e-filed)	January 31
W-2c	Corrected Wage & Tax Statement	Corrects errors on previously filed W-2s. A W-2c form must be provided to the employee, and a copy mailed to, or e-filed with the SSA (Social Security Administration). Do not file a W-2c to correct an address error only. Do not file a W-2c to correct an error on a W-2G form.	File with the employee and SSA as soon as error is discovered	

## Parts Required for States

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

\*\*Certain cities in these states require an 8-part W-2 form.



## How to Prepare Your W-2, 1099 & 941 Forms

Official instructions and more for preparing, W-2, 1099 & 941 forms accurately

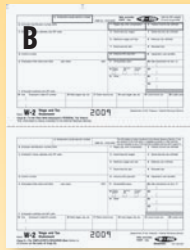
#BOOKLET05

# W-2 Software Compatibility

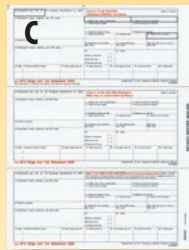
## Preprinted Formats



Traditional, two employees per page



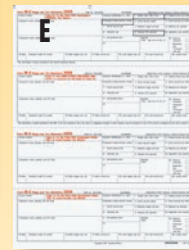
Condensed 2up, one employee, two copies per page



Condensed 3up, one employee, three copies per page



Condensed 4up Version 1, one employee, four copies per page



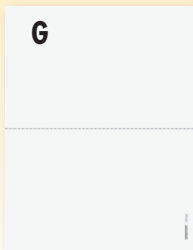
Condensed 4up Version 2, one employee, four copies per page



Continuous

**MORE FORMATS AVAILABLE**  
Request samples to ensure software compatibility

## Blank Formats



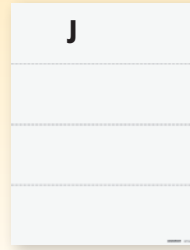
2up



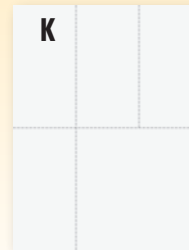
Condensed 3up with  $\frac{3}{4}$ " side perf



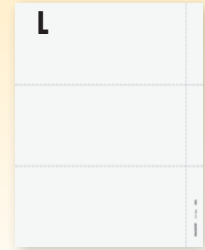
Condensed 4up, Version 1  
Quadrant perf



Condensed 4up, Version 2  
Horizontal perf



Universal  
Print W-2 and 1099s on one stock



Condensed 3up  
For QuickBooks & EasyACCT  
with  $\frac{1}{2}$ " side perf

Software	Compatible W-2 Formats
1099 Convey	A, G, H, I
1099-ETC (AMS)	A, B, C, D, E, F, G, H, I, J, K
Abra	A, F, G, I
AME Software	A, G, H, I
AMS	A, B, C, D, E, F, G, H, I, J, K
Advanced Answers on Demand - Elite	A, D, I
ATX Client WriteUp	A, G, I, J
ATX W-2/1099	K
Blackbaud	A, E
CFS	G, I
Checkmark Software Inc.	A, F, G, K
Cheque-Mate Intl - Insta-Pay	H, I
Client Ledger System	A, B, C, D, E, F, G, H, I, J, K
Competition Software	A, B, C, D, E, F, G, H, I, J
Cougar Mountain Software	A, G
Creative Solutions Inc	A, B, D, G, I
DacEasy	A, D, E, F, G, H, I, J
DDI For Professionals	G, H
Drake	A, D, E, G
EasyACCT	A, C, G, I, L
EG Systems	A, B, C, D, E, F, G, H, I, J
ElectroFile W2 & 1099	A, G, I

Software	Compatible W-2 Formats
Executive Data Systems	A, F
Explorer Software	A, D
Howell	A, B, C, D, F
Infor (Mapics)	A, D, F
Information Returns Inc	G, I
JAT - Printview Plus	G, I
K & S Software Svcs	A, F
KSI Payroll	A, F, G
MAS 90	A, C, D, E, F, G, I, J, K, L
MAS 200	A, C, D, E, F, G, I, J, K, L
Medlin Accounting	A, D, G, I
Micronetics	A, G, I
MicroSoft Dynamics GP	A, D, F, I, J
Millennium Payroll	D, G, I
MYOB	G, I
nP Systems-ATF Payroll	G, I
Pay-e	G, I
Padgett	G, I
Payroll Associates	I
Peachtree Accounting	I
Pensoft	A, G, I
PeopleSoft	A, F
Phoenix Phive - Payroll	A, D, G, I

Software	Compatible W-2 Formats
Plenary Systems	A, F, I
ProSystemFx Writeup	G, I, K
QuickBooks	A, F, I, L
Quicken	A, F, L
Red Wing Software	A, D, F, G, I
SAGE-Bus Works	A, C, D, F, G, I
SAGE-MAS 90	A, C, D, F, G, I
SAGE Master Builder	A, F, G
SAGE Timberline Office	A, D, F, G, I
Software Control Group	G, I
STIFinancial	A, D, F, G
Tax Acctg Sys - W2/1099 Filer	A, B, C, D, E, G, H, I, J
Tax/Pack W2/1099	A, D, F, G, I
Tax Wise Client WU	A, G, I, J
TaxWise W2-1099	K
Taxware Systems Inc	G, I
Time+ Plus	G, I
TruckersHelper	A
UBCC - Unified Payroll	A, D, G, I
W2 Pro	A, D, G, I
WinFiler	A, B, C, D, E, G, H, I, J, K
ZLC Software	D, I
Zpay - PayWindow	A, C, D

All brand names are property of their respective companies.

# 1099 & W-2 Reporting Options - *The right tools make wage and income reporting easy!*

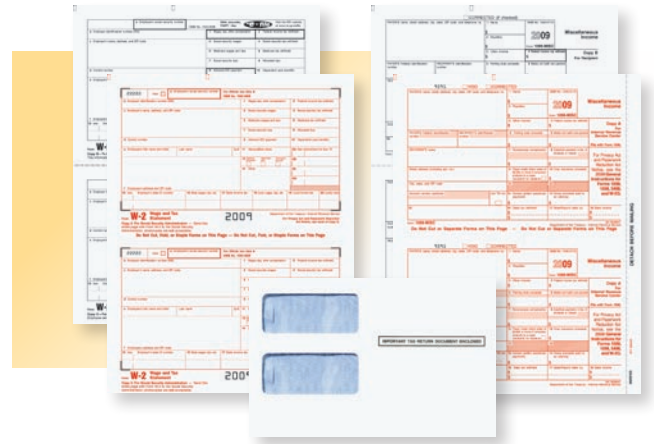
**1099 & W-2 Forms** *Ideal for any business with more than 10 1099s or W-2s to file*

Pgs. 6-25

## IRS-Compliant Forms and Envelopes

This classic method of reporting 1099 & W-2 information gives you many options for efficiency. Our forms work with most software programs, and free samples are available to ensure compatibility.

- Preprinted laser forms
- Blank perforated laser paper
- Continuous forms
- Pressure seal forms
- Envelopes
- Transmittals and corrections
- Much more!



**WinfilerEZ Software** *Ideal for any business with more than 25 1099s or W-2s to file*

Pg. 26

## Complete 1099 & W-2 Reporting... From Start to Finish

WinfilerEZ software makes it easy to enter data, then print and file annual wage and information reports, saving you time! All WinfilerEZ software is bundled with forms for easy ordering and printing.

Try a  
**FREE  
DEMO**

- All 1099, W-2, 1098, 5498 forms and more
- Quick corrections and transmittals
- Easy data import from Quickbooks® and most other software
- Unlimited number of payees and payers
- Easy-to-use, intuitive navigation
- Automatic data checking and annual data transfer
- Condensed forms make printing easy – all recipient copies print on one page, no more separating and collating forms



**EZ1099W2.com** *Ideal for any business with less than 25 1099s or W-2s to file*

Pg. 27

## The easiest way to file 1099s and W-2s online

*You enter 1099 & W-2 data online and EZ1099W2.com does the rest.*

- E-file with the IRS and SSA
- Print and mail recipient copies
- Provide PDF payer copies for records
- Email filing confirmation

*Ideal for any business with less than 25 1099s or W-2s to file,*

EZ1099W2.com contains the most commonly used forms:

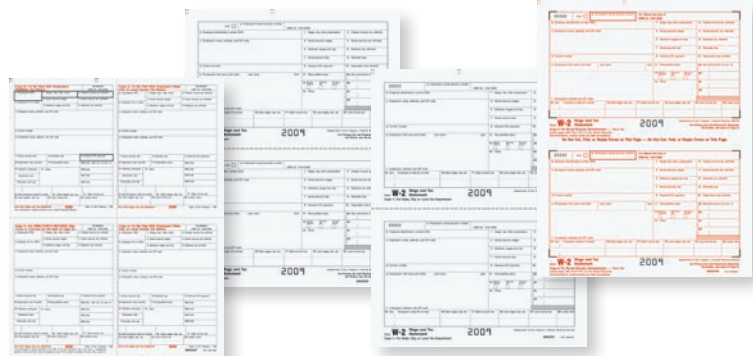
1099-MISC	1099-R	W-2	941
1099-DIV	1099-S	W-2c	944
1099-INT	1099 Corrections		

**Use your special code to get one free filing**  
Ask your sales consultant for details.



## W-2 Condensed Laser Sets

- IRS-approved forms guaranteed compatible with most W-2 software
- Condensed employee copies are printed 2up, 3up or 4up on one page for maximum efficiency
- Employer copies are printed in the traditional format, with two employees per sheet
- Each 8 1/2" x 11" sheet is developed in compliance with IRS regulations
- One FREE W-3 transmittal form is included with your order
- Order the quantity equal to your number of employees in increments of 25 sets (Example: 17 employees order 25 sets; 67 employees order 75 sets)



W-2 Condensed 4up 6pt Preprinted Set  
#W24UPS605

### W-2 Condensed 2up Sets\*

Preprinted Sets Item #	Parts	Compatible Envelope
W2COMBS405	4pt	DWENVO5
W2COMBS605	6pt	DWENVO5
W2COMBS805	8pt	DWENVO5

\*If you need 2up condensed laser sets with blank paper, order traditional 2up blank paper sets on page 7

### W-2 Condensed 3up Sets

Item #	Parts	Compatible Envelope
<b>Preprinted Sets</b>		
W23UPS405	4pt	3UPDWENVO5
W23UPS605	6pt	3UPDWENVO5
<b>Blank Paper Sets</b>		
3UPSET605	6pt	3UPDWENVO5
*3UPSET6105	6pt	3UPDWENVO5

\*Employee instructions are printed on back

### W-2 Condensed 4up Sets

Item #	Parts	Compatible Envelope
<b>Version 1 Preprinted Sets</b>		
W24UPS605	6pt	4UPDWENVO5
W24UPS805	8pt	4UPDWENVO5
<b>Version 1 Blank Paper Sets</b>		
4UPSET605	6pt	4UPDWENVO5
*4UPSET6105	6pt	4UPDWENVO5
4UPSET805	8pt	4UPDWENVO5
*4UPSET8105	8pt	4UPDWENVO5
<b>Version 2 Preprinted Sets</b>		
W24DOWN605	6pt	4DOWNENVO5
W24DOWN805	8pt	4DOWNENVO5
<b>Version 2 Blank Paper Sets</b>		
*4DWNSET605	6pt	4DOWNENVO5
*4DWNSET805	8pt	4DOWNENVO5

\*Employee instructions are printed on back

## Forms Included

Use the "Part Requirements by State" chart on page 3 to determine the parts needed for the state(s) in which you file.

Sets include all forms required for filing with federal, state and local agencies based on the number of parts needed.

### Preprinted Condensed W-2 Sets

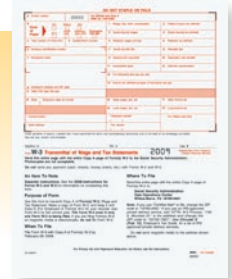
Form Copy	2up Forms			3up Forms		4up Forms	
	4pt	6pt	8pt	4pt	6pt	6pt	8pt
W-2 Employer Federal Copy A	1	1	1	1	1	1	1
W-2 Employer State/City Copy 1	—	1	2	—	1	1	2
W-2 Employer File Copy D	1	1	1	1	1	1	1
W-2 Employee State/City Copy 2	—	1	2	—	—	—	—
Employee 2up Copies B/C	1	1	1	—	—	—	—
Employee 3up Copies B/2/C	—	—	—	1	1	—	—
Employee 4up Copies B/2/C/2	—	—	—	—	—	1	1

### Blank Condensed W-2 Sets

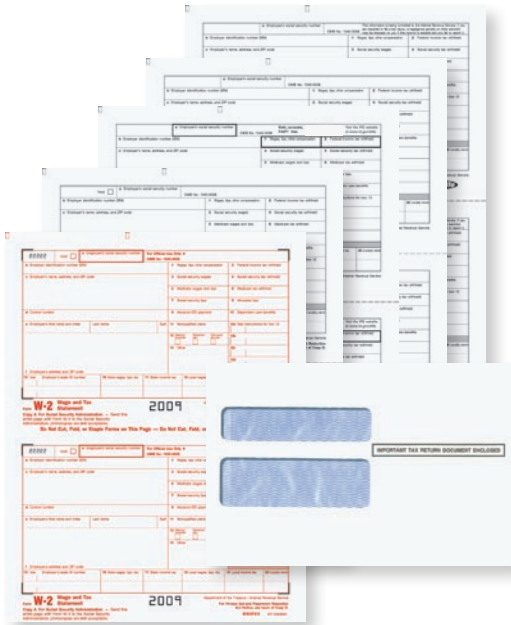
Form Copy	3up Sheets		4up Sheets	
	6pt	8pt	6pt	8pt
W-2 Employer Federal Copy A	1	1	1	1
Blank 2up Laser Paper	1	1	1	2
Blank 3up Laser Paper	1	—	—	—
Blank 4up Laser Paper	—	—	1	1

## W-3 Transmittals

You need one W-3 form to summarize all PAPER W-2 Copy A forms for a single company (EIN). Do not use W-3 forms when e-filing. If you need more than the THREE FREE copies we send with your W-2s, order #BW305.



## W-2 Kits with Envelopes



W-2 Preprinted Traditional 6pt Kit with Envelope  
#W2TRADS6EG

### W-2 Kits with Envelopes

Kits include all forms required for filing with federal, state and local agencies based on the number of parts needed and envelopes.

Use the "Part Requirements by State" chart on page 3 to determine the parts needed for the state(s) in which you file.

- Order the quantity equal to your number of employees in increments of 25 kits (Example: 17 employees order 25 kits; 67 employees order 75 kits)
- All kits include preprinted forms

### W-2 Traditional 2up Laser Kits (with envelopes)

Item #	Parts	Included Envelope	Envelope Seal
W2TRADS4E	4pt	DWENVS05	Self Seal
W2TRADS4EG	4pt	DWENVS05	Moisture Seal
W2TRADS6E	6pt	DWENVS05	Self Seal
W2TRADS6EG	6pt	DWENVS05	Moisture Seal
W2TRADS8E	8pt	DWENVS05	Self Seal
W2TRADS8EG	8pt	DWENVS05	Moisture Seal

### W-2 Condensed 4up Ver. 1 Laser Kits (with envelopes)

Item #	Parts	Included Envelope	Envelope Seal
W24UPS6E	6pt	4UPDWENVS05	Self Seal
W24UPS6EG	6pt	4UPDWENVS05	Moisture Seal
W24UPS8E	8pt	4UPDWENVS05	Self Seal
W24UPS8EG	8pt	4UPDWENVS05	Moisture Seal

## W-2 Traditional Laser Sets

### W-2 Traditional Laser Sets

- IRS-compliant forms guaranteed compatible with your W-2 software
- 2up format is for two different employees per page; print each copy as a batch, then separate and collate for each employee
- Each 8 1/2" x 11" sheet is developed in compliance with IRS regulations
- One FREE W-3 transmittal form is included with your order
- Order the quantity equal to your number of employees in increments of 25 sets (Example: 17 employees order 25 sets; 67 employees order 75 sets)



Traditional 6pt Preprinted Set  
#W2TRADS605

### Forms Included

Use the "Part Requirements by State" chart on page 3 to determine the parts needed for the state(s) in which you file.

Sets include all forms required for filing with federal, state and local agencies based on the number of parts needed.

### Traditional Preprinted & Blank W-2 Sets

Form Copy	Preprinted Forms			Blank Sheets		
	4pt	6pt	8pt	4pt	6pt	8pt
W-2 Employer Federal Copy A	1	1	1	1	1	1
W-2 Employer State/City Copy 1	—	1	2	—	—	—
W-2 Employer File Copy D	1	1	1	—	—	—
W-2 Employee Federal Copy B	1	1	1	—	—	—
W-2 Employee State/City Copy 2	—	1	2	—	—	—
W-2 Employee File Copy C	1	1	1	—	—	—
Blank 2up Laser Paper	—	—	—	2	3	4

### W-2 2up Traditional Laser Sets

Item #	Parts	Compatible Envelope
<b>Preprinted Laser Sets</b>		
W2TRADS405	4pt	DWENVS05
W2TRADS605	6pt	DWENVS05
W2TRADS805	8pt	DWENVS05
<b>Blank Laser Sets</b>		
TRADSET405	4pt	DWENVS05
*TRDSET4105	4pt	DWENVS05
TRADSET605	6pt	DWENVS05
*TRDSET6105	6pt	DWENVS05
TRADSET805	8pt	DWENVS05
*TRDSET8105	8pt	DWENVS05

\*Employee instructions are printed on back of blank paper

## W-2 Preprinted Laser Forms

- IRS-compliant forms guaranteed compatible with your W-2 software
- Each 8 1/2" x 11" sheet is developed in compliance with IRS regulations
- One FREE W-3 transmittal form is included with your order
- Traditional W-2 forms are for printing forms for 2 different employees on the same page
- Order the quantity equal to your number of employees in increments of 25 sets  
(Example: 17 employees order 25 forms; 67 employees order 75 forms)

## W-2 Preprinted Traditional 2up Laser Forms

Item #	Description	Envelope
<b>Traditional Forms</b>		
BW2FED05	W-2 Employer Federal Copy A	n/a
BW2ER105	W-2 Employer State/City/Local Copy 1	n/a
BW2ERD05	W-2 Employer File Copy D	n/a
BW2EEB05	W-2 Employee Federal Copy B	DWENV05
BW2EEZ05	W-2 Employee State/City/Local Copy 2	DWENV05
BW2EEC05	W-2 Employee File Copy C	DWENV05

Formats may change in compliance with IRS standards.

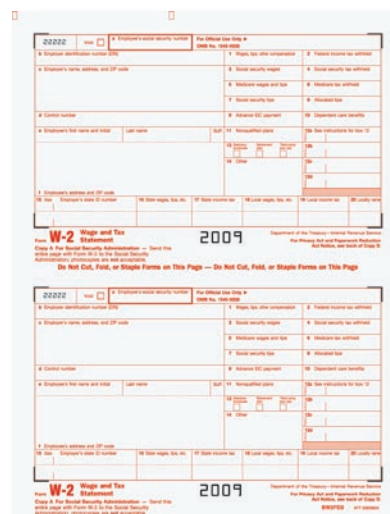
## W-2 Form Descriptions

### EMPLOYER COPIES

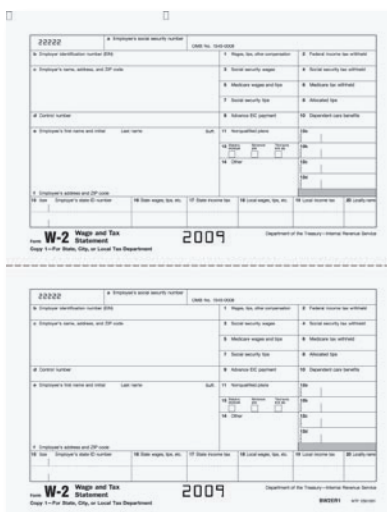
- Copy A For Social Security Administration
- Copy 1 For State, City or Local Tax Department
- Copy D For Employer's Records

### EMPLOYEE COPIES

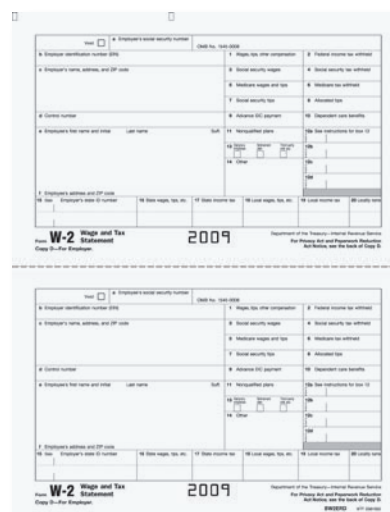
- Copy B To be filed with Employee's Federal Tax Return
- Copy C For Employee's Records
- Copy 2 To be filed with Employee's State, City or Local Income Tax Return



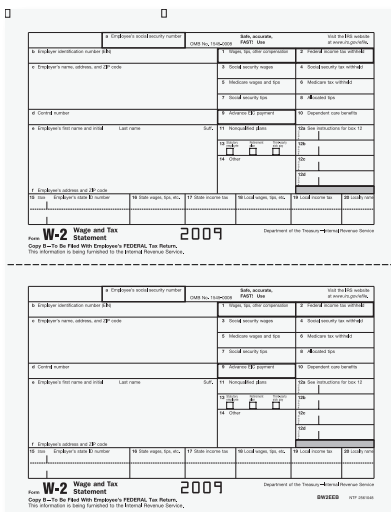
W-2 Employer Federal Copy A  
#BW2FED05



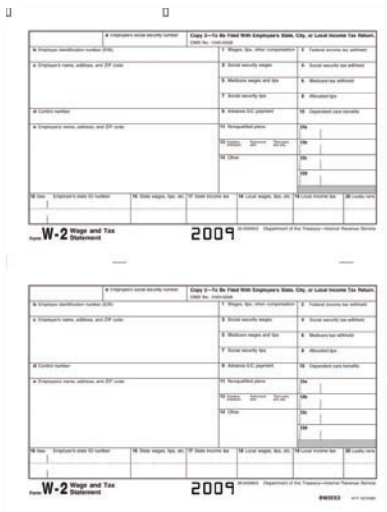
W-2 Employer State/City/Local Copy 1  
#BW2ER105



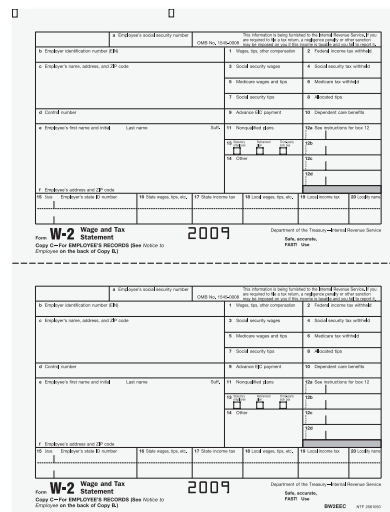
W-2 Employer File Copy D  
#BW2ERD05



W-2 Employee Federal Copy B  
#BW2EEB05



W-2 Employee State/City/Local Copy 2  
#BW2EEZ05



W-2 Employee File Copy C  
#BW2EEC05

New formats for 2009: W-2c, W-3c, 5498 and 941

# W-2 Laser Forms

W-2 Employee 2up Copies B/C  
#BW2EBC05

W-2 Employer 2up Copies D/1  
#BW2ERD105

W-2 Employee 3up Copies B/2/C  
#BW23UP05

W-2 Employee 4up Ver. 1 Copies B/2/C/2  
#BW24UP05

## W-2 Preprinted Condensed 2up, 3up & 4up Laser Forms

Item #	Description	Envelope
BW2EBC05	W-2 Employee 2up Copies B/C	DWEN05
BW2ERD105	W-2 Employer 2up Copies D/1	n/a
BW23UP05	W-2 Employee 3up Copies B/2/C	3UPDWEN05
BW24UP05	W-2 Employee 4up Ver. 1 Copies B/2/C/2	4UPDWEN05
BW24DWN05	W-2 Employee 4up Ver. 2 Copies B/C/2/2	4DOWNEN05
BW24UPER05	W-2 Employer 4up Copies 1/D	n/a

Formats may change in compliance with IRS standards.

- **SAVE TIME!** Condensed forms let you print multiple W-2 forms for the same employee on one sheet
- Order the quantity equal to your number of employees in increments of 25 sets (Example: 17 employees order 25 sets; 67 employees order 75 sets)

W-2 Employee 4up Ver. 2 Copies B/C/2/2  
#BW24DWN05

W-2 Employer 4up Copies 1/D  
#BW24UPER05

**Don't Forget Envelopes - pg. 15**

## W-3 Transmittals

You need one W-3 form to summarize all PAPER W-2 Copy A forms for a single company (EIN). Do not use W-3 forms when e-filing. If you need more than the THREE FREE copies we send with your W-2s, order #BW305.

# W-2 Laser Forms

## W-2 Preprinted Condensed 4up Laser Forms

Item #	Description	Envelope
W24UPA	W-2 Employee 4up Ver. 1A Copies C/B/2/2	80558
80026	W-2 Employer 4up Ver. 1A Copies 1/D	—
B4DWNEMP	W-2 Employer 4up Ver. 2A Copies 1/D	—
BW24DWNA	W-2 Employee 4up Ver. 2A Copies B/C/2/2	4356
80071	W-2 Employee 4up Copies 2/2/B/C	398
80072	W-2 Employer 4up Copies 1/D	—

Formats may change in compliance with IRS standards.

- Order the quantity equal to your number of employees in increments of 25 forms (Example: 17 employees order 25 forms; 67 employees order 75 forms)

This image shows a 4-up preprinted W-2 form for 2009, version 1A. It is designed for employees and includes fields for Social Security Number, Employer Identification Number, Name, Address, and various wage and tax amounts. The form is presented in a condensed 4-up layout.

W-2 Employee 4up Ver. 1A Copies C/B/2/2  
#W24UPA

This image shows a 4-up preprinted W-2 form for 2009, version 1A, designed for employers. It includes fields for Social Security Number, Employer Identification Number, Name, Address, and various wage and tax amounts. The form is presented in a condensed 4-up layout.

W-2 Employer 4up Ver. 1A Copies 1/D  
#80026

This image shows a 4-up preprinted W-2 form for 2009, version 2A, designed for employers. It includes fields for Social Security Number, Employer Identification Number, Name, Address, and various wage and tax amounts. The form is presented in a condensed 4-up layout.

W-2 Employer 4up Ver. 2A Copies 1/D  
#B4DWNEMP

This image shows a 4-up preprinted W-2 form for 2009, version 2A, designed for employees. It includes fields for Social Security Number, Employer Identification Number, Name, Address, and various wage and tax amounts. The form is presented in a condensed 4-up layout.

W-2 Employee 4up Ver. 2A Copies B/C/2/2  
#BW24DWNA

This image shows a 4-up preprinted W-2 form for 2009, designed for employees. It includes fields for Social Security Number, Employer Identification Number, Name, Address, and various wage and tax amounts. The form is presented in a condensed 4-up layout.

W-2 Employee 4up Copies 2/2/B/C  
#80071

## How to Order 4up W-2 Forms

If you have 100 employees and need 6 part W-2 forms, order:

- 100 - Federal Copy A
- 100 - Employee Copy B/C/2/2 (employee will receive an extra copy)
- 100 - Employer Copy 1

If you have 100 employees and need 8 part W-2 forms, order:

- 100 - Federal Copy A
- 100 - Employee Copy B/C/2/2
- 100 - Employer Copy 1
- 100 - Employer Copy D

New formats for 2009: W-2c, W-3c, 5498 and 941

## Compatible Envelopes - pg. 15

This image shows a 4-up preprinted W-2 form for 2009, designed for employers. It includes fields for Social Security Number, Employer Identification Number, Name, Address, and various wage and tax amounts. The form is presented in a condensed 4-up layout.

W-2 Employer 4up Copies 1/D  
#80072

Form W-2c Employer Federal Copy A. This form is used to report wages and taxes for an employee. It includes sections for Employer's name, address, and ZIP code; Social Security number; and various wage and tax amounts. A prominent red banner at the bottom right reads "NEW FORMAT!".

W-2c Employer Federal Copy A  
#BW2C05

Form W-3c Transmittal. This form is used to summarize multiple W-2c forms for a single company. It includes sections for Employer's name, address, and ZIP code; Social Security number; and a summary of the W-2c forms being transmitted. A prominent red banner at the bottom right reads "NEW FORMAT!".

W-3c Transmittal  
#BW3C05

## W-2c & W-3c Correction Forms - NEW FORMATS

Item #	Description	Compatible Envelope
BW2C05	W-2c Employer Federal Copy A	n/a
80075	W-2c Employer File Copy D	n/a
80076	W-2c Employer State/City/Local Copy 1	n/a
80073	W-2c Employee Federal Copy B	W2CENV05
80074	W-2c Employee File Copy C	W2CENV05
80077	W-2c Employee State/City/Local Copy 2	W2CENV05
BW3C05	W-3c Correction Transmittal	n/a

## W-2G 3up Forms

Item #	Description	Compatible Envelope
BW2GFED05	W-2G Federal Copy A	n/a
BW2GER105	W-2G Payer State Copy 1	n/a
BW2GERD05	W-2G Payer Record Copy D	n/a
BW2GEEB05	W-2G Winner Federal Copy B	W2GENV05
BW2GEEC05	W-2G Winner Record Copy C	W2GENV05
BW2GEE205	W-2G Winner State Copy 2	W2GENV05
BW2G3UP05	W-2G Winner 3up Copies B/2/C	W2GENV05

Form W-2G Winner 3up Copies B/2/C. This form is used to report lottery winnings. It includes sections for Winner's name, address, and ZIP code; Social Security number; and the amount of the winning ticket. A prominent red banner at the bottom right reads "NEW FORMAT!".

W-2G Winner 3up Copies B/2/C  
#BW2G3UP05

Form W-2G Federal Copy A. This form is used to report lottery winnings. It includes sections for Winner's name, address, and ZIP code; Social Security number; and the amount of the winning ticket. A prominent red banner at the bottom right reads "NEW FORMAT!".

W-2G Federal Copy A  
#BW2GFED05

• Order the quantity equal to your number of employees in increments of 25 forms (Example: 17 employees order 25 forms; 67 employees order 75 forms)



W-2G Double Window Envelope  
#W2GENV05

## W-3 Transmittals

You need one W-3 form to summarize all PAPER W-2 Copy A forms for a single company (EIN). Do not use W-3 forms when e-filing. If you need more than the THREE FREE copies we send with your W-2s, order #BW305.



## W-2 Blank Perforated Laser Paper

- Guaranteed compatible with W-2 software that prints both image and data (formats vary; request samples to ensure the format works with your software)
- The IRS requires that employee copies be printed on perforated paper
- 20# paper stock unless noted
- Order in increments of 100 sheets
- Priced by the sheet

### W-2 Blank Laser Paper

Item #	Description	Compatible Envelope
WONEPERF05	2up	DWENV05
WONEPERF05	2up with instructions	DWENV05
*83634	3up with 1/2" side Perf	1973
*83634I	3up with 1/2" side Perf with instructions	1973
BW23PERF05	3up with 3/4" side Perf	3UPDWENV05
BW3PERF05	3up with 3/4" side Perf with instructions	3UPDWENV05
4UPPERF05	4up Version 1	4UPDWENV05
4UPPERF05	4up Version 1 with instructions on 2 panels	4UPDWENV05
4UP24	4up Version 1 with instructions 24# paper stock	4UPDWENV05
83631	4up with instructions on all 4 panels	4UPDWENV05
80016	4up Version 2	4DOWNENV05
4DWNPERF05	4up Version 2 with instructions	4DOWNENV05
B4PERF05	4up Universal	1970**

\*Compatible with QuickBooks.

\*\*Not for users of ATX software



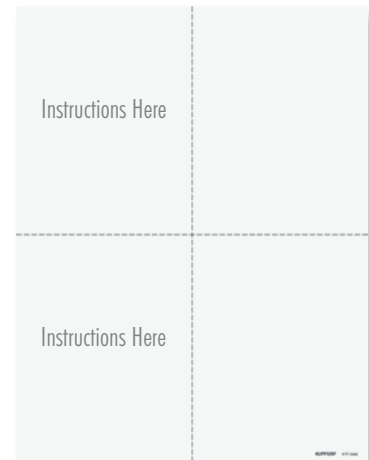
2up Blank Paper  
#WONEPERF05  
#WONEPERF05 (with instructions)



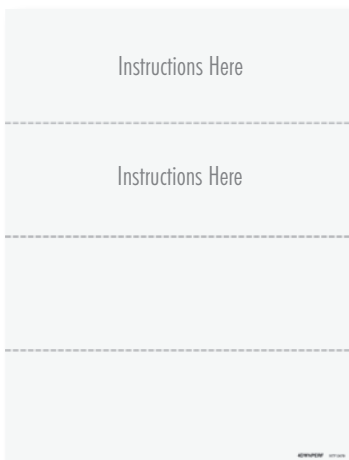
3up Blank Paper  
#83634  
#83634I (with instructions)  
Compatible with QuickBooks



3up Blank Paper  
#BW23PERF05  
#BW3PERF05 (with instructions)



4up Blank Paper Version 1  
#4UPPERF05  
#4UPPERF05 (with instructions)  
#83631 (with instructions on all 4 panels)  
#4UP24 (24# paper with instructions)



4up Blank Paper—Version 2  
#4DWNPERF05 (with instructions)  
#80016



4up Universal Blank Paper  
#B4PERF05

**REQUEST A SAMPLE** of our envelopes if you plan to use them with blank W-2 paper.

It's important to ensure that window placement is compatible with the information your software prints.

Compatible Envelopes - pg. 15

## Why Pressure Seal?

- Pressure Seal is great for processing a high volume of tax forms, checks, and other business forms
- Data is printed on blank or preprinted forms, then using special equipment is folded, sealed and ready for mailing in one easy step
- Pressure Seal saves you time and money by efficiently processing high volumes of forms and eliminating the need for envelopes

## W-2 Pressure Seal Forms

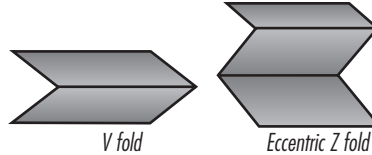
- Designed per IRS regulations
- Simplex imaging eliminates the need to print on both sides
- Use preprinted forms if your software prints only the forms data
- Use blank forms if your software prints the form image and data
- W-2 instructions are printed on the back of blank W-2 forms
- Order in increments of 500 Forms

### Universal Pressure Seal Forms

Item #	Description	Size	Stub Location	Perf Type	Fold Type
80650	Universal Paper	8 1/2" x 14"	n/a	n/a	Eccentric Z

### W-2 Pressure Seal Forms

Item #	Description	Copies	Size	Stub Location	Perf Type	Fold Type
<b>Preprinted</b>						
80481	W-2 4up Version 1	Employee Copies C/B/2/2	8 1/2" x 14"	Bottom	Quadrant	Eccentric Z
80483	W-2 4up Version 2	Employee Copies B/C/2/2	8 1/2" x 14"	Bottom	Horizontal	Eccentric Z
80732	W-2 4up Version 1	Employee Copies 2/2/B/C	8 1/2" x 11"		Quadrant	V
80733	W-2 3up	Employee Copies B/2/C	8 1/2" x 14"	Bottom	Horizontal	Eccentric Z
<b>Blank</b>						
80640	W-2 4up Version 1	n/a	8 1/2" x 14"	Bottom	Quadrant	Eccentric Z
80642	W-2 4up Version 2	n/a	8 1/2" x 14"	Bottom	Horizontal	Eccentric Z
MW283	W-2 4up Version 1	n/a	8 1/2" x 11"			V



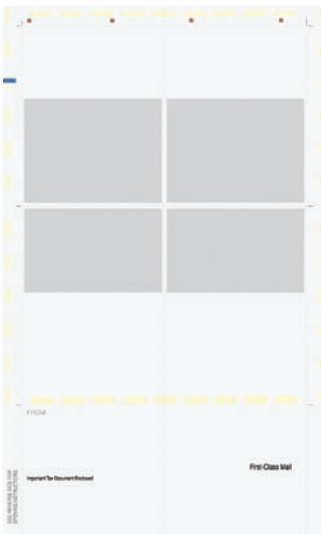
W-2 4up Version 1  
#80481—Compatible to #MW1287



W-2 4up Version 2  
#80483—Compatible to #MW1286



W-2 4up  
#80732—Compatible to #MW285



W-2 4up Version 1  
#80640—Compatible to #MW1289



W-2 4up Version 2  
#80642—Compatible to #MW1288

## Universal Pressure Seal Form

Simplify printing!

Use the Universal Pressure Seal Form to print both W-2s and 1099s.

#80650



New formats for 2009: W-2c, W-3c, 5498 and 941

## W-2 Continuous Forms

For dot-matrix printers or typewriters

- Guaranteed compatible with your software
- One FREE transmittal form included with your order

## W-2 Continuous Forms

Item #	Description	Copy Part
<b>Carbonless</b>		
<i>Compatible envelope #DWENV05</i>		
CW2054	One-Wide 4pt	A,B,C,D
CW2056	One-Wide 6pt	A,1,B,C,2,D
CW2058	One-Wide 8pt	A,1,1,B,C,2,2,D
<i>Compatible envelope #2DWENV05</i>		
2CW2052	Two-Wide 4pt	Left D:Right A,B,C
2CW2053	Two-Wide 6pt	Left D/1, Blank Right A,B,C,2
2CW2054	Two-Wide 8pt	Left D/1,D/1,D/1 Right A,B,C,2,2
<i>Compatible envelope #DWENV05</i>		
TSCW2ER053	Twin-Set Employer 3pt	A,1,D
TSCW2EE053	Twin-Set Employee 3pt	B,2,C
TSCW2ER054	Twin-Set Employer 4pt	A,1,D,1
TSCW2EE054	Twin-Set Employee 4pt	B,2,C,2
TSCW2053	Twin-Set 6pt	A,1,D,B,2,C
TSCW2054	Twin-Set 8pt	A,1,D,1,B,2,C,2
<b>Self-Mailer</b>		
QMW2054	One-Wide 4pt	A,D,B,C
QMW2056	One-Wide 6pt	A,1,D,B,C,2
2QMW2056	Two-Wide 6pt	Right A:B,C,2 Left: 1/D,1/D
2QMW2058	Two-Wide 8pt	Right A:B,C,2,2 Left: 1/D,1/D,1/D
QMTSW2056	Twin-Set 6pt	Employer Non-Mailer 2pt A,1/D Employee Mailer 4pt 1/D : B,C,2

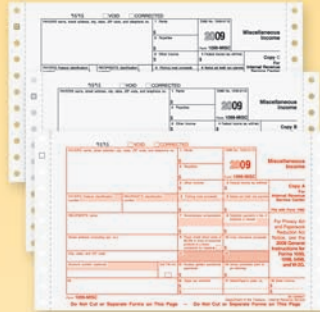
## W-2 Electronic Reporting Forms

Item #	Parts	Copy Part
<b>Carbonless</b>		
<i>Compatible envelope #DWENV05</i>		
MMCW2053	3pt	B,C,1/D
MMCW2054	4pt	B,C,2, 1/D
MMCW2055	5pt	B,C,2,2, 1/D
<b>Self-Mailer</b>		
MMQMW2D053	4pt	1/D : B,C,2
MMQMW2ND053	4pt (non-dated)	1/D : B,C,2
MMQMW2D054	6pt	1/D, 1/D: B,C,2,2

## W-2G, W-2C and W-9 Continuous Forms

Item #	Description	Copy Part
W-2G	Certain Gambling Winnings <i>Compatible envelope #W2GENV05</i>	
CW2G056	Carbonless 6pt (3 per page)	A,1,B,C,2,D
W-2C	Corrected Wage and Tax Statement <i>Compatible envelope #W2CENV05</i>	
CW2C056	Non-Dated Carbonless 6pt	A,1,B,C,2,D

## Construction Options for W-2 Forms



**Carbonless Construction –**  
Print on all copies without a carbon interleave.



**Electronic Reporting\* –**  
Print recipient, state, local and file copies. Copy A is not included because you file it electronically.

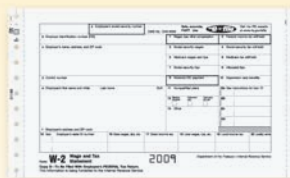
**\*Electronic filing is required for payers with over 250 employees**



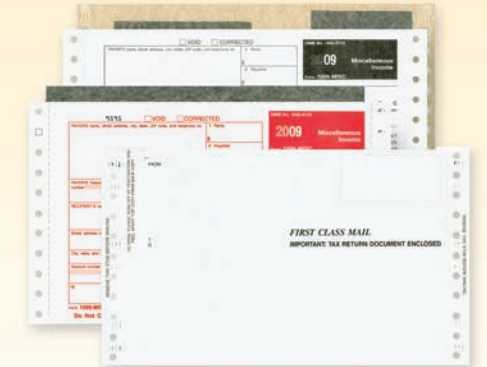
**One-Wide –**  
Suitable for any size printer or typewriter, making this format our most popular continuous form.



**Two-Wide –**  
For use on wide, 132 column printers. Employer and employee copies are printed side by side. Version 1 has employee copies on the right.



**Twin Sets –**  
For printers that cannot legibly print more than four parts. Employer and employee copies printed separately.



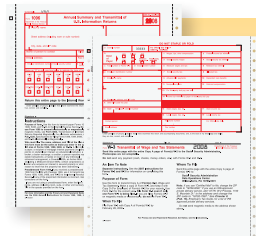
**Self-Mailer –**  
Print form data for all copies at once. Tear off the employer/payer copies, and the employee copies are printed, pre-inserted into envelopes and are ready to mail.

## Transmittals

You need one **W-3 form** to summarize all PAPER W-2 Copy A forms for a single company (EIN). Do not use W-3 forms when e-filing.

**THREE FREE W-3s** are included with your W-2 order. If you need more, please order the following items.

Item #	Description
W3052	W-3 2pt Transmittal
W3C052	W-3C 2pt Correction Transmittal





#1970 - Moisture Seal  
#1970S - Self Seal



#DWENV05 - Moisture Seal  
#DWENV05S - Self Seal



#1973 - Moisture Seal  
#1973S - Self Seal



#3UPDWENV05 - Moisture Seal  
#3UPDWENV05S - Self Seal



#4UPDWENV05 - Moisture Seal  
#4UPDWENV05S - Self Seal



#4DOWNENV05 - Moisture Seal  
#4DOWNENV05S - Self Seal



#80558 - Moisture Seal  
#80558S - Self Seal



#4356 - Moisture Seal  
#4356S - Self Seal



#W2GENV05



#2DWENV05



#1961



#SWENV05



#398



#4UPALT9



#W2CENV05

## W-2 Envelopes

- Envelopes are constructed of 24# white wove stock
- Compatible with nearly all W-2 forms
- Interior tint provides secure delivery of confidential employee information
- All envelopes are imprinted in black with "Important Tax Return Document Enclosed" according to compliance regulations

Item #	Description	Overall Size	Top Window Size		Top Window Distance From		Bottom Window Size		Bottom Window Distance From	
			Left Edge	Bottom Edge	Left Edge	Bottom Edge	Left Edge	Bottom Edge		
<b>Moisture Seal W-2 Envelopes</b>										
*1970	W-2 Universal Double Window	5 <sup>5</sup> / <sub>8</sub> " x 8 <sup>3</sup> / <sub>4</sub> "	1/2"	2 1/2"	1/2"	3 1/16"	9/16" x 2 1/2"	3 1/16"	1 1/2"	
DWENV05	W-2 2up Double Window	5 3/4" x 8 3/4"	1 5/16"	4 1/8"	1/2"	3 3/8"	1 3/8" x 4 1/8"	1/2"	1 9/16"	
*1973	W-2 3up Double Window	3 7/8" x 8 1/2"	7/8"	3 1/4"	3/8"	2 1/4"	1 3/16" x 3 1/4"	3/8"	1"	
3UPDWENV05	W-2 3up Double Window	3 7/8" x 8"	1"	3 1/8"	3/8"	2 3/16"	3/4" x 3 1/8"	3/8"	1"	
4UPDWENV05	W-2 4up Ver. 1 Double Window	5 3/4" x 8 3/4"	9/16"	3 7/8"	5/16"	3 9/16"	1 1/16" x 3 7/8"	4 3/8"	2 1/2"	
4DOWNENV05	W-2 4up Ver. 2 Double Window	5 3/4" x 8 3/4"	3/4"	3 13/16"	5/16"	4 3/16"	3/4" x 3 13/16"	5/16"	5/8"	
80558	• W-2 4up Ver. 1A Double Window	5 5/8" x 9"	1 1/16"	3 11/16"	5/8"	3 9/32"	1 1/16" x 3 11/16"	5/8"	1 5/32"	
4356	• W-2 4 Down Ver. 2 Alt. Dbl. Win.	5 5/8" x 9"	3/4"	3 3/8"	3/8"	4 1/4"	7/8" x 3 3/8"	3/8"	5/8"	
W2GENV05	W-2G Double Window	3 3/4" x 9"	1"	3"	1/2"	2 3/16"	1" x 3"	1/2"	7/8"	
2DWENV05	W-2 Two-Wide Double Window	5 5/8" x 9 1/2"	1 5/16"	4 1/16"	1/2"	3 11/32"	1 7/16" x 4 1/16"	1/2"	1 1/2"	
1961	• W-2 4up Ver. 1 Double Window	5 5/8" x 9"	3/4"	3 7/8"	3/8"	3 7/16"	3/4" x 3 7/8"	3/8"	2 7/16"	
SWENV05	W-2 2up Single Window	5 3/4" x 8 3/4"	—	—	—	—	1 3/8" x 4 1/8"	1/2"	1 9/16"	
4UPALT9	• W-2 4up 9" Double Window	5 5/8" x 9"	9/16"	3 7/8"	5/16"	3 9/16"	1 1/16" x 3 7/8"	4 3/8"	2 1/2"	
W2CENV05	W-2c Double Window	5 3/4" x 9"	1 5/16"	3 13/16"	1/2"	3 1/4"	1" x 3 11/16"	4 5/16"	1 7/8"	
<b>Self Seal W-2 Envelopes</b>										
1970S	W-2/1099 Universal Double Window	5 5/8" x 8 3/4"	1/2"	2 1/2"	1/2"	3 1/16"	9/16" x 2 1/2"	3 1/16"	1 1/2"	
DWENV05S	W-2 2up Double Window	5 3/4" x 8 3/4"	1 5/16"	4 1/8"	1/2"	3 3/8"	1 3/8" x 4 1/8"	1/2"	1 9/16"	
3UPDWENV05S	W-2 3up Double Window	3 7/8" x 8"	1"	3 1/8"	3/8"	2 3/16"	3/4" x 3 1/8"	3/8"	1"	
*1973S	• W-2 3up Double Window	3 7/8" x 8 1/2"	7/8"	3 1/4"	3/8"	2 1/4"	1 3/16" x 3 1/4"	3/8"	1"	
4UPDWENV05S	W-2 4up Ver. 1 Double Window	5 3/4" x 8 3/4"	9/16"	3 7/8"	5/16"	3 9/16"	1 1/16" x 3 7/8"	4 3/8"	2 1/2"	
4DOWNENV05S	W-2 4up Ver. 2 Double Window	5 3/4" x 8 3/4"	3/4"	3 13/16"	5/16"	4 3/16"	3/4" x 3 13/16"	5/16"	5/8"	
80558S	W-2 4up Ver. 1A Double Window	5 5/8" x 9"	1 1/16"	3 11/16"	5/8"	3 9/32"	1 1/16" x 3 11/16"	5/8"	1 5/32"	
4356S	W-2 4up Ver. 2 Alt. Dbl Window	5 5/8" x 9"	3/4"	3 3/8"	3/8"	4 1/4"	7/8" x 3 3/8"	3/8"	5/8"	

\*Not for users of ATX Software

- For high-speed inserting equipment

FREE Samples

## Guide to 1099 Forms

**1099 Forms:** Payment statement for payments made to non-employees of a business, or for other reasons as required by the government.  
*If any date shown falls on a Saturday, Sunday or legal holiday, the due date is the next business day.*

Form	Title	What to Report	Amounts to Report	Due Date	
				To IRS	To Recipient (unless indicated otherwise)
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
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	February 28*	(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	February 28*	(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	February 28*	January 31
1098-T	Tuition Statement	Qualified tuition and related expenses, reimbursements or refunds, and scholarships or grants (optional).	See instructions	February 28*	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	February 28*	(To Borrower) January 31
1099-B	Proceeds From Broker and Barter Exchange Transactions	Sales or redemptions of securities, future transactions, commodities, and barter exchange transactions.	All amounts	February 28*	<b>February 15**</b>
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	February 28*	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	February 28*	(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	February 28*	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	February 28*	January 31
1099-H	Health Coverage Tax Credit (HCTC) Advance Payments	Health insurance premiums paid on behalf of certain individuals.	All amounts	February 28*	January 31
1099-INT	Interest Income	Interest income.	\$10 or more (\$600 or more in some cases)	February 28*	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	February 28*	January 31
1099-MISC	Miscellaneous Income (Also, use to report direct sales of \$5,000 or more of consumer goods for resale.)	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	February 28*	January 31**
		Payments to crew members by owners or operators of fishing boats including payments of proceeds from sales of catch.	All amounts		
		Section 109A 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		
		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 dividends and tax-exempt interest payments reportable by brokers.	\$10 or more		<b>February 15**</b>
		Gross proceeds paid to attorneys.	\$600 or more		<b>February 15**</b>
1099-OID	Original Issue Discount	Original issue discount.	\$10 or more	February 28*	January 31**
1099-PATR	Taxable Distributions Received From Cooperatives	Distributions from cooperatives passed through to their patrons including any domestic production activities deduction and certain pass-through credits.	\$10 or more	February 28*	January 31
1099-Q	Payments From Qualified Education Programs (Under Sections 529 and 530)	Earnings from qualified tuition programs and Coverdell ESAs.	All amounts	February 28*	January 31
1099-R	Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.	Distributions from retirement or profit-sharing plans, any IRA, insurance contracts, and IRA recharacterizations.	\$10 or more	February 28*	January 31
1099-S	Proceeds From Real Estate Transactions	Gross proceeds from the sale or exchange of real estate and certain royalty payments.	Generally, \$600 or more	February 28*	<b>February 15**</b>

\* The due date is March 31 if filed electronically.

\*\*The due date is March 15 for reporting by trustees and middlemen of WHFTS.

# Guide to 1099 Forms

Form	Title	What to Report	Amounts to Report	Due Date	
				To IRS	To Recipient (unless indicated otherwise)
1099-SA	Distributions From an HSA, Archer MSA, or Medicare Advantage MSA	Distributions from an HSA, Archer MSA, or Medicare Advantage MSA.	All amounts	February 28*	January 31
3922	Transfer of Stock Acquired Through an Employee Stock Purchase Plan Under Section 423(c)	Transfer(s) of stock acquired through an employee stock purchase plan under section 423(c).	All amounts	February 28*	January 31
5498	IRA Contribution Information	Contributions (including rollover contributions) to any individual retirement arrangement (IRA) including a SEP, SIMPLE, and Roth IRA; Roth conversions; IRA recharacterizations; and the fair market value (FMV) of the account.	All amounts	May 31	(To Participant) For FMV/RMD Jan 31; For contributions, May 31
5498-ESA	Coverdell ESA Contribution Information	Contributions (including rollover contributions) to a Coverdell ESA.	All amounts	May 31	April 30
5498-SA	HSA, Archer MSA, or Medicare Advantage MSA Information	Contributions to an HSA (including transfers and rollovers) or Archer MSA and the FMV of an HSA, Archer MSA, or Medicare Advantage MSA.	All amounts	May 31	(To Participant) May 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; \$1500 or more from keno	February 28*	January 31
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	To SSA	To Recipient
				Last day of February*	January 31

\* The due date is March 31 if filed electronically.

\*\*The due date is March 15 for reporting by trustees and middlemen of WHFITS.

## 1099 Ordering Guide

### Which forms do you need?

Use the table above to determine which form you need.

### How are you printing forms?

For laser and inkjet printers, use laser forms. For dot-matrix printer or typewriters, use continuous forms. If you process a larger volume of forms, consider using pressure seal to save time.

### What type of software are you using?

Standard 1099 formats are compatible with most software programs. Standard formats are available for all 1099s. Non-standard formats (i.e., 4up) are available for 1099-MISC and 1099-R. Request a free sample to ensure compatibility with your software.

### Do you need blank or preprinted forms?

If your software prints only the recipient data, use preprinted forms. If your software prints the recipient data AND the form itself (boxes, etc.), use blank perforated laser paper.

### How will you deliver forms to your employees?

Don't forget window envelopes made specifically for our forms for easy, secure mailing. For more efficient mailing, use self-seal envelopes.

### How many parts do you need?

If you need to file 1099s with city or local agencies (most common for 1099-MISC and 1099-R), order a 4 or 5 part form.

### How many 1096 Transmittal forms do you need?

Use one 1096 Transmittal form for all of the 1099, 1098, 5498, and W-2G forms filed by a single EIN or TIN. Use one 1096 for each type of form filed.

## Options for Efficient Printing

### Blank Forms

Use with software that prints the actual form (boxes, headers, etc.) AND recipient data in one pass.

### Preprinted Forms

Use with software that prints only the recipient data.

### Continuous Forms

Use with dot-matrix printers or typewriters.

### Pressure Seal Forms

Ideal for easily printing and mailing a large volume of forms.

### Envelopes

Secure delivery for all types of 1099s.

### Sets & Kits

Get 1099 forms in one convenient set; some include envelopes.

### Other Wage & Withholding Forms

Quarterly and annual reporting forms, such as 940, 941 and 945 Forms are also available; call for details.

### Parts Required for States

State	Parts	State	Parts	State	Parts
Alabama**	4 or 5	Kentucky**	3 or 4	North Dakota	4 or 5
Alaska	3	Louisiana	3 or 4	Ohio**	3 or 4
Arizona	4	Maine	4 or 5	Oklahoma	4 or 5
Arkansas	4 or 5	Maryland**	3 or 4	Oregon	3 or 4
California	3 or 4	Massachusetts	4 or 5	Pennsylvania**	4 or 5
Colorado	4 or 5	Michigan**	3	Rhode Island	4
Connecticut	4 or 5	Minnesota	3 or 4	South Carolina	4 or 5
Delaware**	4 or 5	Mississippi	4 or 5	South Dakota	3
District of Columbia	4	Missouri**	3 or 4	Tennessee	3
Florida	3	Montana	4 or 5	Texas	3
Georgia	3 or 4	Nebraska	4 or 5	Utah	4 or 5
Hawaii	3 or 4	Nevada	3	Vermont	3 or 4
Idaho	4 or 5	New Hampshire	3	Virginia	4
Illinois	3 or 4	New Jersey	4	Washington	3
Indiana	3 or 4	New Mexico	3 or 4	West Virginia	4
Iowa	3 or 4	New York**	3 or 4	Wisconsin	4 or 5
Kansas	4	North Carolina	4 or 5	Wyoming	3

States noted as 3 or 4 part for 1099-MISC filing: If federal taxes have been withheld on the 1099-MISC, then a 4-part form is required; otherwise, a copy is not required to be filed with the recipient's personal taxes.

\*Some states require a 5-part form if Box 16 (State tax withheld) is filled in on the 1099-MISC form.

## 1099 Kits with Envelopes

Kits include all forms required for filing with federal, state and local agencies based on the number of parts needed and envelopes.

Use the "Part Requirements by State" chart on page 17 to determine the parts needed for the state(s) in which you file.

- Order the quantity equal to your number of employees in increments of 25 sets (Example: 17 employees order 25 sets; 67 employees order 75 sets)
- All kits include preprinted forms
- NOTE: Items ending in "E" come with self seal envelopes and those ending in "EG" come with standard moisture seal envelopes

**Kits with Envelopes are Convenient for Small Businesses.**

### 1099 Kits with Envelopes

Item #	Parts	Format	Included Envelope
<b>1099-DIV - Dividends &amp; Distributions</b>			
DIVS3E	3pt	2up	RDWENV05
DIVS3EG	3pt	2up	RDWENV05
DIVS4E	4pt	2up	RDWENV05
DIVS4EG	4pt	2up	RDWENV05
<b>1099-MISC - Miscellaneous Income</b>			
MISCS3E	3pt	2up	RDWENV05
MISCS3EG	3pt	2up	RDWENV05
MISCS4E	4pt	2up	RDWENV05
MISCS4EG	4pt	2up	RDWENV05
MISCS5E	5pt	2up	RDWENV05
MISCS5EG	5pt	2up	RDWENV05
<b>1099-R - Distributions from Pensions, Annuities, Etc.</b>			
RS4E	4pt	2up	RDWENV05
RS4EG	4pt	2up	RDWENV05
RS6E	6pt	2up	RDWENV05
RS6EG	6pt	2up	RDWENV05
<b>1099-INT - Interest Income</b>			
INTS3E	3pt	3up	99DWENV05
INTS3EG	3pt	3up	99DWENV05
INTS4E	4pt	3up	99DWENV05
INTS4EG	4pt	3up	99DWENV05



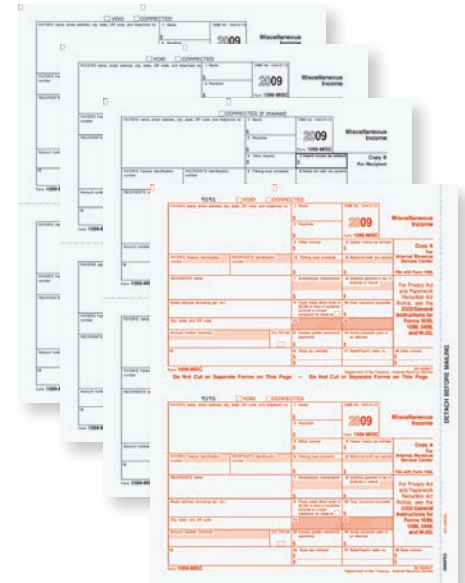
1099-MISC 2up Laser Kit with Envelope #MISCS3E

## 1099 Laser Sets

- Sets include all forms required for filing with federal, state and local agencies based on the number of parts needed
- Blank sets include red-scannable Copy A
- Each 8 1/2" x 11" sheet is developed in compliance with IRS regulations
- 1099-R 2up format is compatible with most software; to confirm compatibility with the 3up and 4up formats, call or request a free sample
- One FREE 1096 transmittal form is included with your order
- Order the quantity equal to your number of employees in increments of 25 sets (Example: 17 employees order 25 sets 67 employees order 75 sets)

### 1099 Sets (no envelopes included)

Item #	Description	Format	Compatible Envelope
<b>1099-DIV</b>			
DIVS305	Preprinted 3pt	2up	RDWENV05
DIVS405	Preprinted 4pt	2up	RDWENV05
DIVSET305	Blank 3pt	2up	RDWENV05
DIVSET405	Blank 4pt	2up	RDWENV05
<b>1099-INT</b>			
INTS305	Preprinted 3pt	3up	99DWENV05
INTS405	Preprinted 4pt	3up	99DWENV05
INTSET305	Blank 3pt	3up	99DWENV05
INTSET405	Blank 4pt	3up	99DWENV05
<b>1099-MISC</b>			
MISCS305	Preprinted 3pt	2up	RDWENV05
MISCS405	Preprinted 4pt	2up	RDWENV05
MISCS505	Preprinted 5pt	2up	RDWENV05
MISCSSET305	Blank 2up 3pt	2up	RDWENV05
MISCSSET405	Blank 2up 4pt	2up	RDWENV05
MISCSSET505	Blank 2up 5pt	2up	RDWENV05
<b>1099-R</b>			
RS405	Preprinted 4pt	2up	RDWENV05
RS605	Preprinted 6pt	2up	RDWENV05
RS805	Preprinted 8pt	2up	RDWENV05
R4UPS605	Preprinted 6pt	4up	R4UPDWENV05
R4UPS805	Preprinted 8pt	4up	R4UPDWENV05
RSET405	Blank 4pt	2up	RDWENV05
RSET605	Blank 6pt	2up	RDWENV05
RSET805	Blank 8pt	2up	RDWENV05
R4UPSET605	Blank 6pt	4up	R4UPDWENV05
R4UPSET805	Blank 8pt	4up	R4UPDWENV05
<b>1098-T</b>			
B98TSET05	Preprinted 3pt	3up	99DWENV05



1099-MISC 2up 4pt Preprinted Set #MISCS405

## 1096 Transmittals

You need one 1096 form to transmit a summary of 1099, 1098, 5498 and W-2G forms filed by a single EIN or TIN. Use one 1096 for each type of form filed.

If you need more than the THREE FREE copies we send with your 1099s, order #B109605.



1099-MISC Recipient Copies B/2  
#BMISB205

1099-R 4up Recipient Copies B/2/C/2  
#BR4UP05

1099-MISC Federal Copy A  
#BMISFED05

1099-INT Federal Copy A  
#BINTFED05

1099-DIV Federal Copy A  
#BDIVFED05

1099-R Federal Copy A  
#BRFED05

## Most Popular Preprinted 1099 Laser Forms

- Guaranteed compatible with your software
- Each 8 1/2" x 11" sheet is perforated according to IRS regulations
- If you need more 1096 Transmittals than the FREE copy we send with your 1099s, order #B109605 (see page 20)
- Order the quantity equal to your number of employees in increments of 25 forms (Example: 17 employees order 25 forms; 67 employees order 75 forms)

Item #	Description	Format
<b>1099-MISC</b>	<b>Miscellaneous Income</b> <i>Compatible Envelope #RDWEN05</i>	
BMISFED05	1099-MISC Federal Copy A	2up
BMISREC05	1099-MISC Recipient Copy B	2up
BMISPAY05	1099-MISC Payer Copy C	2up
BMIS105	1099-MISC Payer State Copy 1	2up
BMIS205	1099-MISC Recipient State Copy 2	2up
BMISB205	1099-MISC Recipient Copies B/2	2up
<b>1099-R</b>	<b>Distributions From Pensions, Annuities, etc.</b> <i>Compatible Envelope #RDWEN05 (unless noted)</i>	
BRFED05	1099-R Federal Copy A	2up
BRPAY05	1099-R Payer State/Local Copy 1/D	2up
BRB05	1099-R Recipient Federal Copy B	2up
BR205	1099-R Recipient State/City/Local Copy 2	2up
BRREC05	1099-R Recipient File Copy C	2up
BR3UP05	1099-R 3up Recipient Copies B/C/2 <i>Compatible Envelope #99DWEN05</i>	3up
BR4UP05	1099-R 4up Recipient Copies B/2/C/2 <i>Compatible Envelope #R4UPDWEN05</i>	4up
LR4UP	1099-R 4up Recipient Copies B/2/C/2 - Alternate format. <i>Compatible Envelope #DWR4</i>	4up
LR4UPER	1099-R 4up Payer Copies 1/D, 1/D, 1/D, 1/D	4up
<b>1099-DIV</b>	<b>Dividends &amp; Distributions</b> <i>Compatible Envelope #RDWEN05</i>	
BDIVFED05	1099-DIV Federal Copy A	2up
BDIVREC05	1099-DIV Recipient Copy B	2up
BDIVPAY05	1099-DIV Payer Copy C	2up
<b>1099-INT</b>	<b>Interest Income</b> <i>Compatible Envelope #99DWEN05</i>	
BINTFED05	1099-INT Federal Copy A	3up
BINTREC05	1099-INT Recipient Copy B	3up
BINTPAY05	1099-INT Payer Copy C	3up

New formats for 2009: W-2c, W-3c, 5498 and 941

## 1099 Preprinted Laser Forms

- Guaranteed compatible with your software
- Each 8 1/2" x 11" sheet is perforated according to IRS regulations
- Order the quantity equal to your number of employees in increments of 25 forms (Example: 17 employees order 25 forms; 67 employees order 75 forms)

Item #	Description	Format
<b>1099-A</b>	<b>Acquisition/Abandonment of Secured Property</b> <i>Compatible Envelope #99DWEN05</i>	
BAFED05	1099-A Federal Copy A	3up
BAREC05	1099-A Borrower Copy B	3up
BAPAY05	1099-A Lender Copy C	3up
<b>1099-B</b>	<b>Proceeds From Broker Transactions</b> <i>Compatible Envelope #RDWEN05</i>	
BBFED05	1099-B Federal Copy A	2up
BBREC05	1099-B Recipient Copy B	2up
BBPAY05	1099-B Payer Copy C	2up
<b>1099-C</b>	<b>Cancellation of Debt</b> <i>Compatible Envelope #99DWEN05</i>	
BCFED05	1099-C Federal Copy A	3up
BCREC05	1099-C Debtor Copy B	3up
BCPAY05	1099-C Creditor Copy C	3up
<b>1099-CAP</b>	<b>Changes in Corp. Control/Cap. Structure</b> <i>Compatible Envelope #99DWEN05</i>	
BCAPFED05	1099-CAP Federal Copy A	3up
BCAPB05	1099-CAP Shareholder Copy B	3up
BCAPC05	1099-CAP Corp. Copy C	3up
<b>1099-DIV</b>	<b>Dividends &amp; Distributions (See page 19)</b>	
<b>1099-G</b>	<b>Certain Government Payments</b> <i>Compatible Envelope #99DWEN05</i>	
BGFED05	1099-G Federal Copy A	3up
5028	1099-G Recipient Copy B	3up
5029	1099-G Payer Copy C	3up
<b>1099-INT</b>	<b>Interest Income (See page 19)</b>	
<b>1099-LTC</b>	<b>Long-Term Care &amp; Accelerated Death Benefits</b>	
BLTCFED05	1099-LTC Federal Copy A	3up
<b>1099-MISC</b>	<b>Miscellaneous Income (See page 19)</b>	
<b>1099-OID</b>	<b>Original Issue Discount</b> <i>Compatible Envelope #99DWEN05</i>	
BOIDFED05	1099-OID Federal Copy A	3up
BOIDREC05	1099-OID Recipient Copy B	3up
BOIDPAY05	1099-OID Payer Copy C	3up
<b>1099-PATR</b>	<b>Taxable Distributions From Cooperatives</b> <i>Compatible Envelope #99DWEN05</i>	
BPATRFED05	1099-PATR Federal Copy A	3up
BPATRRC05	1099-PATR Recipient Copy B	3up
BPATRPY05	1099-PATR Payer Copy C	3up
<b>1099-Q</b>	<b>Payments From Qualified Education Programs</b> <i>Compatible Envelope #99DWEN05</i>	
BQFED05	1099-Q Federal Copy A	3up
BQREC05	1099-Q Recipient Copy B	3up
<b>1099-R</b>	<b>Distributions from Pensions, Annuities, Etc.</b> (See page 19)	
<b>1099-S</b>	<b>Proceeds From Real Estate Transactions</b> <i>Compatible Envelope #99DWEN05</i>	
BSFED05	1099-S Federal Copy A	3up
BSREC05	1099-S Transferor Copy B	3up
BSPAY05	1099-S Filer or State Copy C	3up
<b>1099-SA</b>	<b>Distributions From an HSA, Archer MSA, or Medicare Advantage</b> <i>Compatible Envelope #99DWEN05</i>	
BMSAFED05	1099-SA Federal Copy A	3up
9377	1099-SA Recipient Copy B	3up
9378	1099-SA Payer or State Copy C	3up

## 1096 Transmittals

You need one 1096 form to transmit a summary of 1099, 1098, 5498 and W-2G forms filed by a single EIN or TIN. Use one 1096 for each type of form filed.

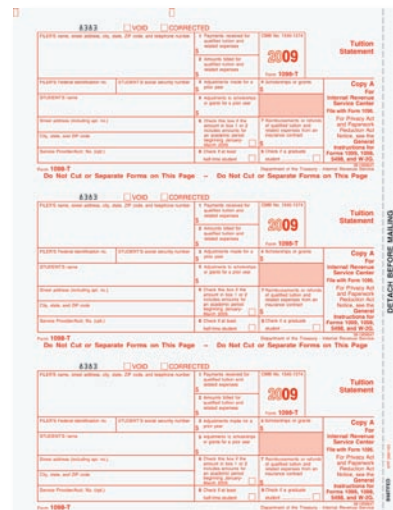
If you need more than the THREE FREE copies we send with your 1099s, order #B109605.

Item #	Description	Format
<b>1098</b>	<b>Mortgage Interest Statement</b> <i>Compatible Envelope #99DWEN05</i>	
B1098FED05	1098 Federal Copy A	3up
B1098RC05	1098 Recipient Copy C	3up
B1098PY05	1098 Payer Copy B	3up
<b>1098-C</b>	<b>Contributions of Motor Vehicles, Boats and Airplanes</b> <i>Compatible Envelope #1098CENV</i>	
B1098CA05	1098-C IRS Copy A	1up
B1098CB05	1098-C Donor Copy B	1up
B1098CC05	1098-C Donor File Copy C	1up
B1098CD05	1098-C Donee Copy D	1up
<b>1098-E</b>	<b>Student Loan Interest Statement</b> <i>Compatible Envelope #99DWEN05</i>	
B98EFED05	1098-E Federal Copy A	3up
B98EREC05	1098-E Borrower Copy B	3up
B98EPAY05	1098-E Recipient Copy C	3up
<b>1098-T</b>	<b>Tuition Statement</b> <i>Compatible Envelope #99DWEN05</i>	
B98TFED05	1098-T Federal Copy A	3up
B98TREC05	1098-T Student Copy B	3up
B98TPAY05	1098-T Filer Copy C	3up
<b>1042-S</b>	<b>Foreign Person's U.S. Source Income Subject to Withholding</b> <i>Compatible Envelope #42SSWEN05</i>	
1042SFED05	1042-S Federal Copy A	2up
1042SB05	1042-S Recipient Record Copy B	2up
1042SC05	1042-S Recipient Federal Copy C	2up
1042SD05	1042-S Recipient State Copy D	2up
1042SE05	1042-S Withholding Agent Record Copy E	2up
<b>3921</b>	<b>Exercise of Incentive Stock Option under Section 422(b)</b> <b>NEW</b> <i>Compatible Envelope #990WEN05</i>	
B3921FED05	3921 Federal Copy A	3up
<b>3922</b>	<b>Transfer of Stock Acquired Through Employee Stock Purchase Plan under Section 423(c)</b> <b>NEW</b> <i>Compatible Envelope #990WEN05</i>	
B3922FED05	3922 Federal Copy A	3up
<b>5498</b>	<b>IRA Contribution Information</b> <b>NEW FORMAT 2009</b> <i>Compatible Envelope #RDWEN05</i>	
B5498FED05	5498 Federal Copy A	2up
B5498RC05	5498 Participant Copy B	2up
B5498PY05	5498 Trustee or Issuer Copy C	2up
<b>5498-ESA</b>	<b>Coverdell ESA Contribution Information</b> <i>Compatible Envelope #99DWEN05</i>	
BESAFED05	5498-ESA Federal Copy A	3up
BESAB05	5498-ESA Beneficiary Copy B	3up
<b>5498-SA</b>	<b>HSA, Archer MSA, or Medicare Advantage Information</b> <i>Compatible Envelope #99DWEN05</i>	
B98MSFED05	5498-SA Federal Copy A	3up
9380	5498-SA Participant Copy B	3up
9381	5498-SA Trustee Copy C	3up

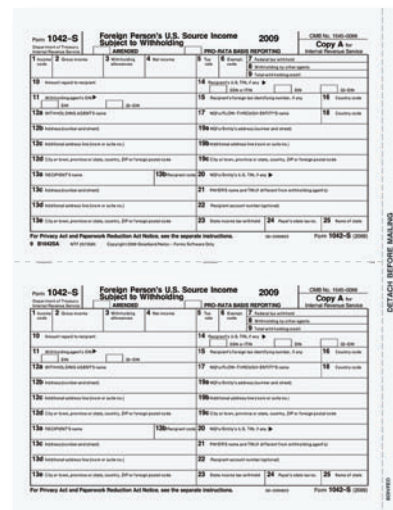
Formats may change in compliance with IRS standards.



### Compatible Envelopes - pg. 25



1098-T Federal Copy A #B98TFED05



1042-S #1042SFED05

# 1099 Laser Forms

1099-S Federal Copy A  
#BSFED05

1099-A Federal Copy A  
#BAFED05

1098 Federal Copy A  
#B1098FED05

1099-B Federal Copy A  
#BFED05

1099-Q Federal Copy A  
#BQFED05

1099-LTC Federal Copy A  
#BLTCFED05

1099-G Federal Copy A  
#BGFED05

1099-OID Federal Copy A  
#BOIDFED05

1099-PATR Federal Copy A  
#BPATFED05

## 1099 Blank Perforated Laser Paper

- Compatible with 1099 software that prints both image and data (formats vary; request a sample to ensure the format works with your software)
- 1099-R recipient copies can be printed in 2up, 3up or 4up formats
- The IRS requires that recipient copies be printed on perforated paper
- "Backer" indicates which parts of the form have instructions printed on the back
- Order in increments of 100 sheets
- Priced by the sheet

### 1099 Blank Laser Paper

Item #	Description	Compatible Envelope
WONEPERF05	2up 1099-MISC, -B, -DIV, -R	RDWENV05
WONEPERFMIO5	2up with 1099-MISC instructions on the top form	RDWENV05
80014	2up with 1099-MISC instructions on both forms	RDWENV05
80637	2up with 1/2" side Perf	RDWENV05
B99PERF05	3up with 1/2" side Perf	99DWENV05
B99PERFMIO5	3up with 1/2" side Perf with 1099-MISC instructions on top and middle forms	99DWENV05
4UPPERF05	4up 1099-R	4UPDWENV05 or DWR4
80728	4up 1099-R with instructions	4UPDWENV05 or DWR4
B4PERF05	4up Universal 1099-R and 1099-MISC	1970*
90NEPERF05	1099 3-up without side Perf	99ENVA

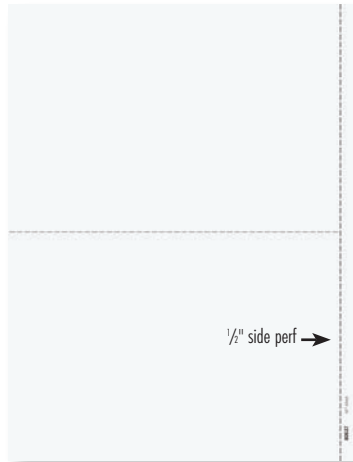
\*Not for use with ATX Software



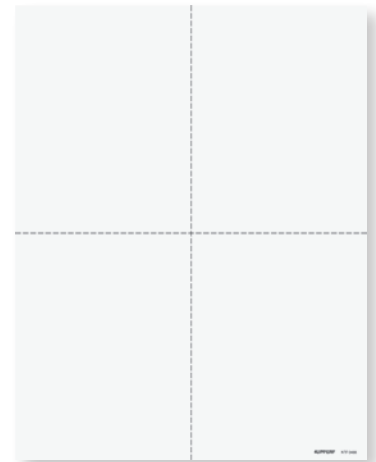
2up Blank Paper  
#WONEPERF05  
#WONEPERFMIO5 (with 1099-MISC instructions on top form)  
#80014 (with 1099-MISC instructions on both forms)



3up Blank Paper with Side Perf  
#B99PERF05  
#B99PERFMIO5 (with 1099-MISC inst.)  
#90NEPERF05 (no side perf)



2up Blank Paper with Side Perf  
#80637

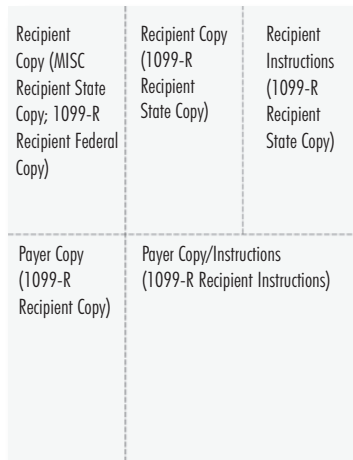


4up Blank Paper  
#4UPPERF05

**REQUEST A SAMPLE** of our envelopes if you plan to use them with blank 1099 paper.

It's important to ensure that window placement is compatible with the information your software prints.

Compatible Envelopes - pg. 25



4up Universal Blank Paper  
#B4PERF05

## Why Pressure Seal?

- Pressure Seal is great for processing a high volume of tax forms, checks, and other business forms
- Data is printed on blank or preprinted forms, then using special equipment is folded, sealed and ready for mailing in one easy step
- Pressure Seal saves you time and money by efficiently processing high volumes of forms and eliminating the need for envelopes

## 1099 Pressure Seal Forms

- Designed per IRS regulations
- Simplex imaging eliminates the need to print on both sides
- Use preprinted forms if your software prints only the forms data
- Use blank forms if your software prints the form image and data
- Order in increments of 500 Forms

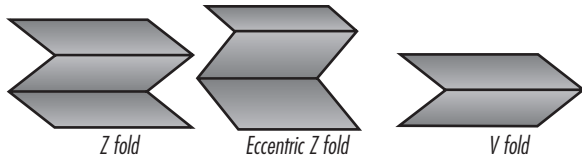
### Universal Pressure Seal Forms

Item #	Description	Size	Stub Location	Perf Type	Fold Type
80650	Universal Paper	8 1/2" x 14"	n/a	n/a	Eccentric Z

### 1099 Pressure Seal Forms

Item #	Description	Copies	Size	Fold Type
<b>Preprinted</b>				
80485	1099-INT	Recipient Copy B	8 1/2" x 11"	Z
80487	1099-MISC	Recipient Copies 2, B	8 1/2" x 11"	Z
LMISCP5B	1099-MISC w/instructions	Recipient Copies 2, B	8 1/2" x 11"	Z
MW1304	1099-R 3up		8 1/2" x 14"	Eccentric Z
80735	1099-R 4up Version 1	Recipient Copies 2/2/C/B	8 1/2" x 11"	V
80799	1099-R 4up Version 1	Recipient Copies 2/2/C/B	8 1/2" x 14"	Eccentric Z
80736	1098-T	Recipient Copy B	8 1/2" x 11"	Z
<b>Blank</b>				
80349†	Multi-Purpose	n/a	8 1/2" x 11"	Z
80752	1099-R Blank			

† Best used with 1099-INT and 1099-DIV

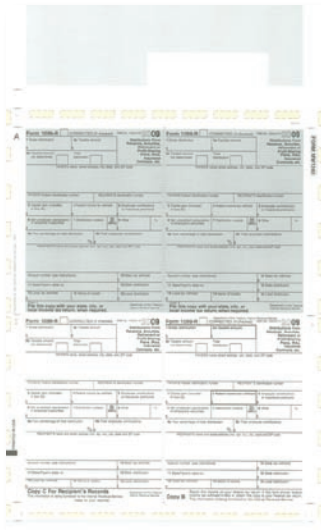


## Universal Pressure Seal Form

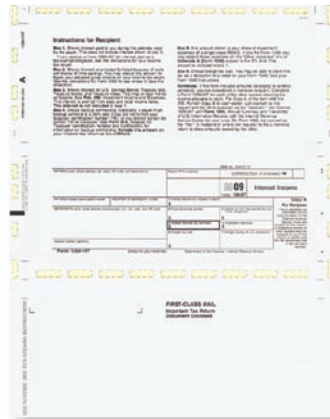
Simplify printing!

Use the Universal Pressure Seal Form to print both W-2s and 1099s.

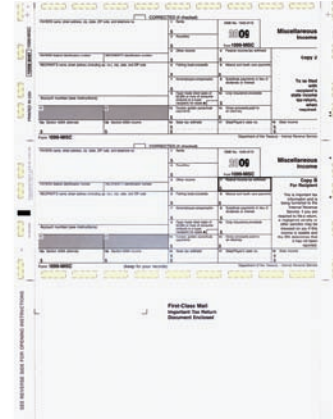
#80650



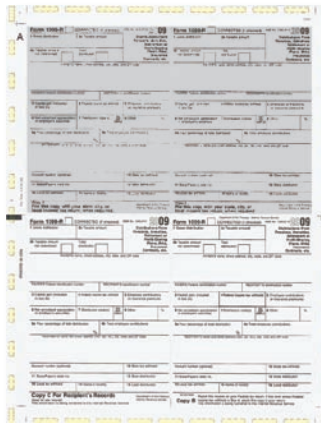
1099-R 4up  
#80799—Compatible to #MW1240



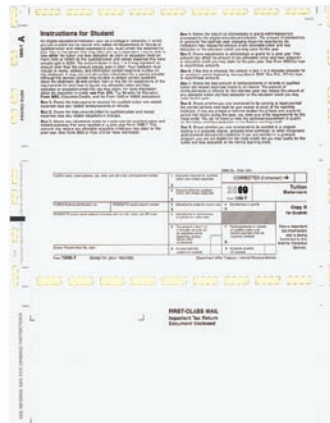
1099-INT  
#80485—Compatible to #MW351



1099-MISC  
#80487—Compatible to #MW353



1099-R 4up  
#80735—Compatible to #MW284



1098-T  
#80736—Compatible to #MW359



1099 Multi-Purpose  
#80349—Best used for 1099-INT and 1099-DIV

## 1099 Continuous Forms

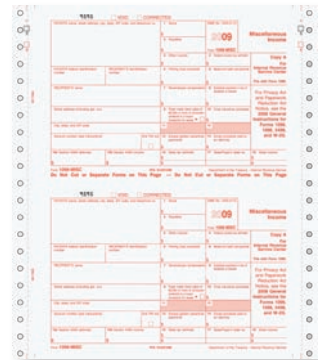
### Most Popular 1099s

Item #	Description	Copy Part
<b>1099-DIV</b>	<b>Dividends &amp; Distributions</b> <i>Compatible envelope #RDWENVO5</i>	
CDIV053	1099-DIV 3pt Carbonless	A,B,C
CDIV054	1099-DIV 4pt Carbonless	A,State, B,C
QMDIV054	1099-DIV 4pt SM	A,State,C : B
<b>1099-INT</b>	<b>Interest Income</b> <i>Compatible envelope #99DWENVO5</i>	
CINT053	1099-INT 3pt Carbonless	A,B,C
CINT054	1099-INT 4pt Carbonless	A,State, B,C
QMINT054	1099-INT 4pt SM	A,State, C : B
MMPAINT052	1099-INT 2pt ER SM	State/C:B
MMINTND052	1099-INT 2pt Non-Dated ER SM	State/C:B
<b>1099-MISC</b>	<b>Miscellaneous Income</b> <i>Compatible envelope #RDWENVO5</i>	
CMISO53	1099-MISC 3pt Carbonless	A,B,C
CMISO54	1099-MISC 4pt Carbonless	A,State, B,C
CMISO55	1099-MISC 5pt Carbonless	A,1,B,2,C
PAMISO53	1099-MISC 3pt SM	A,C : B
PAMISO54	1099-MISC 4pt SM	A,State,C:B
QMMISO55	1099-MISC 5pt SM	A,1, C : B,2
MMMISO51	1099-MISC 1pt ER	B
MMPAMISO52	1099-MISC 2pt ER SM	C : B
MMQMISO53	1099-MISC 3pt ER SM	C : B,2
MMMISND053	1099-MISC 3pt Non-Dated ER SM	C : B,2
<b>1099-R</b>	<b>Distributions From Pensions, Annuities, etc.</b> <i>Compatible envelope #RDWENVO5</i>	
CRO54	1099-R 4pt Carbonless	A,B,C,D
CRO56	1099-R 6pt Carbonless	A,1,B,C,2,D
QMRO54	1099-R 4pt SM	A,D : B,C
QMRO56	1099-R 6pt SM	A,1,D : B,C,2

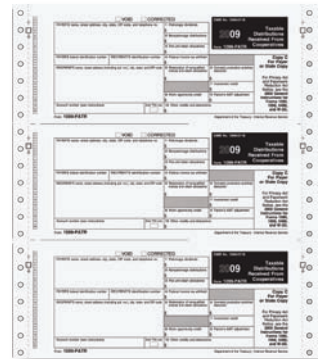
### Other 1099s

Item #	Description	Copy Part
<b>1099-A</b>	<b>Acquisition/Abandonment of Secured Property</b> <i>Compatible envelope #99DWENVO5</i>	
CSAO54	1099-A 4pt Carbonless	A,State,B,C
<b>1099-B</b>	<b>Proceeds From Broker &amp; Barter Exchange Transactions -</b> <i>Compatible envelope #RDWENVO5</i>	
CB053	1099-B 3pt Carbonless	A,B,C
CB054	1099-B 4pt Carbonless	A,State, B,C
<b>1099-C</b>	<b>Cancellation of Debt</b> <i>Compatible envelope #99DWENVO5</i>	
CC053	1099-C 3pt Carbonless	A,B,C
<b>1099-G</b>	<b>Certain Government Payments</b> <i>Compatible envelope #99DWENVO5</i>	
CG054	1099-G 4pt Carbonless	A,State,B,C
<b>1099-LTC</b>	<b>Long-Term Care &amp; Accelerated Death Benefits</b> <i>Compatible envelope #99DWENVO5</i>	
CLTC054	1099-LTC 4pt Carbonless	A,B,C,D
<b>1099-OID</b>	<b>Original Issue Discount</b> <i>Compatible envelope #99DWENVO5</i>	
COID054	1099-OID 4pt Carbonless	A,State, B,C
<b>1099-PATR</b>	<b>Taxable Distributions Received From Cooperatives</b> <i>Compatible envelope #99DWENVO5</i>	
CPATRO54	1099-PATR 4pt Carbonless	A,State,B,C
MMQMPATRO52	1099-PATR 2pt ER SM	C : B
<b>1099-Q</b>	<b>Payments From Qualified Education Programs</b> <i>Compatible envelope #99DWENVO5</i>	
CQ053	1099-Q 3pt Carbonless	A,B,C
<b>1099-S</b>	<b>Proceeds From Real Estate Transactions</b> <i>Compatible envelope #99DWENVO5</i>	
CS053	1099-S 3pt Carbonless	A,B,C
CS054	1099-S 4pt Carbonless	A,State,B,C
QMS053	1099-S 4pt SM	A,State,C:B
<b>Item #</b>	<b>Description</b>	<b>Copy Part</b>
<b>1098</b>	<b>Mortgage Interest Statement</b> <i>Compatible envelope #99DWENVO5</i>	
C1098053	1098 3pt Carbonless	A,B,C
C1098054	1098 4pt Carbonless	A,State,B,C
PAT1098054	1098 4pt SM	A,State,C:B
MMPA1098052	1098 2pt ER SM	C : B
MM98ND052	1098 2pt Non-Dated ER SM	C : B
<b>1098-T</b>	<b>Tuition Statement</b> <i>Compatible envelope #99DWENVO5</i>	
C1098T053	1098-T 3pt Carbonless	A,B,C
C1098T054	1098-T 4pt Carbonless	A,State,B,C
PA98T054	1098-T 4pt Mailer	A,State,C:B
MMPA98T052	1098-T 2pt ER SM	C : B
<b>5498</b>	<b>IRA Contribution Information</b> <i>Compatible envelope #RDWENVO5</i>	
MMPA5498052	5498 2pt ER SM	C : B
C5498053	5498 3pt Carbonless	A,B,C
<b>1042-S</b>	<b>Foreign Person's US Source Income Subject to Withholding</b> <i>Compatible envelope #42SSWENVO5</i>	
C1042S055	1042-S 5pt Carbonless	A,B,C,D,E

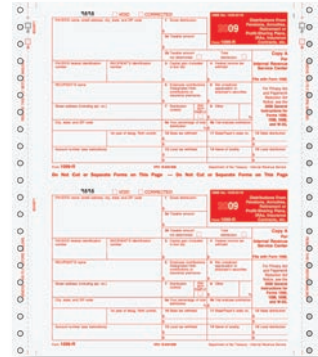
ER = Electronic Reporting  
SM = Self Mailer (Does not require a separate envelope)



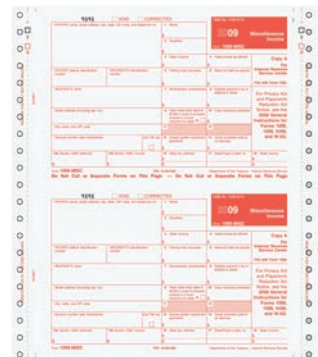
1099-MISC 4pt Carbonless  
#CMISO54



1099-PATR 2pt Electronic Reporting Self-Mailer  
#MMQMPATRO52



1099-R 4pt Carbonless  
#CRO54



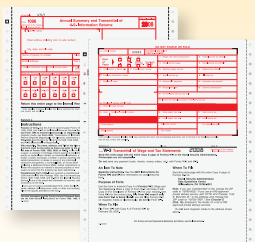
1099-MISC 4pt Self-Mailer  
#PAMISO54

## Transmittals

You need one **1096 form** to transmit a summary of 1099, 1098, 5498 and W-2G forms files by a single EIN or TIN. Use one 1096 for each type of form filed.

THREE FREE 1096 forms are included with your 1099 order. If you need more, please order using the following item number.

Item #	Description
1096052	1096 2pt Transmittal



**NEW  
FORMAT!**

# 1099 Envelopes



#1970 - Moisture Seal  
#1970S - Self Seal



#RDWENV05 - Moisture Seal  
#RDWENV05S - Self Seal



#99DWENV05 - Moisture Seal  
#99DWENV05S - Self Seal



#99ENVA - Moisture Seal



#R4UPDWENV05 - Moisture Seal  
#R4UPDWENV05S - Self Seal



#RALT9 - Moisture Seal



#42SSWENV05 - Moisture Seal



#99SWENV05 - Moisture Seal



#70007 - Moisture Seal  
#70007S - Self Seal

## 1099 Envelopes

- Envelopes are constructed from 24# white wove stock
- Compatible with nearly all W-2 & 1099 forms
- Interior tint provides secure delivery of recipient's information on the forms
- All envelopes are imprinted in black with "Important Tax Return Document Enclosed"

Item #	Description	Overall Size	Top Window Size	Top Window Distance From		Bottom Window Size	Bottom Window Distance From	
				Left Edge	Bottom Edge		Left Edge	Bottom Edge
<b>Moisture Seal 1099 Envelopes</b>								
1098CENV (not shown)	1098C Double Window	55/8" x 9"	1 5/16" x 3 3/8"	1/2"	3 5/8"	1 1/8" x 3 3/8"	1/2"	1 13/16"
1970	1099 Universal Double Window	5 5/8" x 8 3/4"	1/2" x 2 1/2"	1/2"	3 11/16"	9/16" x 2 1/2"	3/16"	1 1/2"
RDWENV05	1099 2up Double Window	5 5/8" x 8 3/4"	1 3/8" x 3 3/8"	1/2"	3 11/16"	1 7/16" x 3 3/8"	1/2"	1 17/32"
99DWENV05	1099 3up Double Window	3 7/8" x 8 1/4"	1" x 3 1/8"	1/2"	2 3/16"	1 1/8" x 3 1/8"	1/2"	5/8"
99SWENV05	1099 3up Single Window	3 7/8" x 8 1/4"	—	—	—	1 1/8" x 3 1/8"	1/2"	5/8"
99ENVA	• 1099 Double Window	3 5/16" x 9 3/16"	1" x 3 5/16"	9/16"	2 5/16"	1 1/8" x 3 5/16"	9/16"	3/4"
R4UPDWENV05	1099-R 4up Double Window	5 3/4" x 8 3/4"	3/4" x 4 1/16"	3/8"	3 11/16"	1 1/16" x 3 15/16"	4 1/2"	2 5/8"
RALT9	• 1099-R 4up Alt. Double Window	5 5/8" x 9"	3/4" x 4 1/16"	3/8"	3 11/16"	1 1/16" x 4 1/16"	4 1/2"	2 5/8"
DWR4 (not shown)	• 1099-R 4up Alt. Double Window	5 3/4" x 9"	1 1/16" x 3 5/8"	5/8"	3 5/16"	1 1/16" x 3 5/8"	4 5/16"	1 1/8"
42SSWENV05	1042-S Single Window	5 5/8" x 9"	—	—	—	1 1/4" x 3 9/16"	1/2"	2 1/32"
70007	• 1099 for Jack Henry Software	3 7/8" x 9"	7/8" x 3 5/8"	1/2"	2 3/8"	1 9/16" x 3 5/8"	1/2"	1/2"
<b>Self Seal 1099 Envelopes</b>								
1970S	W-2/1099 Universal Double Window	5 5/8" x 8 3/4"	1/2" x 2 1/2"	1/2"	3 11/16"	9/16" x 2 1/2"	3/16"	1 1/2"
RDWENV05S	1099 2up Double Window	5 5/8" x 8 3/4"	1 3/8" x 3 3/8"	1/2"	3 11/16"	1 7/16" x 3 3/8"	1/2"	1 17/32"
99DWENV05S	1099 3up Double Window	3 7/8" x 8 1/4"	1" x 3 1/8"	1/2"	2 3/16"	1 1/8" x 3 1/8"	1/2"	5/8"
R4UPDWENV05S	1099-R 4up Double Window	5 3/4" x 8 3/4"	3/4" x 4 1/16"	3/8"	3 11/16"	1 1/16" x 3 15/16"	4 1/2"	2 5/8"
70007S	1099 for Jack Henry Software	3 7/8" x 9"	7/8" x 3 5/8"	1/2"	2 3/8"	1 9/16" x 3 5/8"	1/2"	1/2"

All envelopes have side seams

- For high-speed inserting equipment

**FREE Samples**

New formats for 2009: W-2c, W-3c, 5498 and 941

# WinfilerEZ 1099 & W-2 Reporting Software



## All the Tools You Want...from Start to Finish

Winfiler software is a complete 1099 and W-2 reporting solution designed to help you eliminate time spent on wage and income reporting.

### Save Time with WinfilerEZ

#### Easy Data Entry

- Easy-to-use, intuitive navigation
- Information can be rolled forward from year-to-year
- Automatic data checking, decimal placement and easily changed default settings
- Data organized by payer

#### Comprehensive Functionality

- Unlimited payers and payees
- Online updates
- Network installation available
- E-filing available

#### Streamlined Printing

- Preview forms on-screen before printing
- Print on condensed forms and save time – all forms for one employee are printed on the same page – no separating and collating needed
- Order software, forms and envelopes in one convenient set
- Use preprinted or blank forms

### Import Data from Other Software

WinfilerEZ can import your data from other applications, including QuickBooks®, to save even more time!

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#### WinfilerEZ has it all

- ✓ All W-2 Forms
- ✓ All 1099, 1098, and 5498 Forms
- ✓ W-3, 1096, W-2c and 1099 Corrections
- ✓ Payer, Payee, Returns and ProForma Journals
- ✓ Express Services E-Filing Center
- ✓ Data Import
- ✓ Unlimited payers and payees



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*Ideal for any business with  
more than 25 W-2s or 1099s!*

Ideal for any business  
with **less than**  
25 W-2s or 1099s!

# EZ1099W2.com

Easy 1099 and W-2 Filing

## WinfilerEZ Software Packages

All software is bundled with W-2 or 1099-MISC forms

All software bundles include condensed employee forms, where all copies are printed on a single page to gain efficiency. Simply print, fold, and insert into an envelope - no separating or collating needed!

### WinfilerEZ with Preprinted Forms

Preprinted forms have all of the boxes and form titles printed, WinfilerEZ will fill in the data.

#### WinfilerEZ with Preprinted W-2 Forms

**Packages for:**

- 50 Employees
- 100 Employees
- 250 Employees

**Includes:**

- WinfilerEZ software for preprinted forms
- W-2 Employer Copy A(federal), 1(state/local), and D(file)
- W-2 condensed 4up Employee Copy B/C/2/2 (federal/file/state/local)
- Envelopes for mailing employee copies

#### WinfilerEZ with Preprinted 1099-MISC Forms

**Packages for:**

- 50 Recipients
- 100 Recipients
- 250 Recipients

**Includes:**

- WinfilerEZ software for preprinted forms
- 1099-MISC Payer Copy A(federal), 1(state), and C(file)
- 1099-MISC condensed 2up Recipient Copy B/2(federal/file)
- Envelopes for mailing recipient copies

### WinfilerEZ with Blank Forms

WinfilerEZ will print all of the form boxes, titles, and recipient data on blank perforated paper.

#### WinfilerEZ with Blank W-2 Forms

**Packages for:**

- 50 Employees
- 100 Employees
- 250 Employees

**Includes:**

- WinfilerEZ software for blank forms
- W-2 Employer Copy A(federal, red scannable) and 2up blank paper for Employer Copy 1(state/local) and D(file)
- W-2 Employee condensed 4up blank paper with instructions for copies B/C/2/2(federal/file/state/local)
- Envelopes for mailing employee copies

#### WinfilerEZ with Blank 1099-MISC Forms

**Packages for:**

- 50 Recipients
- 100 Recipients
- 250 Recipients

**Includes:**

- WinfilerEZ software for blank forms
- 1099-MISC Payer Copy A(federal, red scannable) and 2up blank paper for Payer Copy 1(state) and C(file)
- 1099-MISC Recipient condensed 2-up blank paper with instructions for copies B(federal) and 2(file)
- Envelopes for mailing recipient copies

## You enter data online, EZ1099W2.com does the rest

- E-file with the IRS and SSA
- Print and mail recipient copies
- Provide payer copies
- Email filing confirmation

### Everything is done for you

#### E-file with IRS or SSA

1099s will be e-filed with the IRS and W-2s e-filed with the SSA. Separate W-3 or 1096 transmittal forms are not required.

#### Print and Mail Recipient Forms

We print and mail each recipient 4 copies of the 1099 or W-2 to attach to tax returns or keep on file.

#### Provide Payer Copy

After forms are submitted, we post a PDF for your files. You can also use this copy to mail state and local government agencies as required. (EZ1099W2.com does not file with states, cities, or local governments.)

#### Email Confirmation

We'll email you a confirmation when your forms have been successfully submitted.

### Easy Data Entry

You enter data online, on a screen that looks like the actual 1099, W-2, or 941 form or import data from QuickBooks® or other software, then your data rolls over each year.

### Easy Reconciliation

After you've entered data for each recipient you can:

- Review and edit information
- Generate reconciliation reports
- Submit all of forms or only those selected

### EZ1099W2.com is affordable!

#### Only \$4.95 per form

W-2	1099-MISC	1099-INT	941
W-2c	1099-DIV	1099-R	944

Use your special code to get **ONE FREE FILING**. Ask your sales consultant for details.

## Your 1099 & W-2 Partner...

We're here to answer your questions and help you get the right tools for wage and information reporting. Please give us a call if you would like more information or need help selecting the right forms.

Our goal is to deliver everything you need to run your business successfully!



## And More...

We can help with all the forms your business needs.

- Business computer checks
- Quality presentation folders
- Window envelopes
- Standard and specialty mailing envelopes
- Check-writing software for QuickBooks®

