

FORM 1099 PREPARATION

Upload this form to mkatzcpa.com portal - do NOT email it.
~Never email anything with a social security number.~

All the forms must be submitted no later than January 10th.

Report amounts paid by CASH, CHECK, WIRE, ZELLE or MONEY ORDER

Do Not include payments made by PAYPAL, CREDIT CARD, DEBIT CARD OR VENMO.

PAYER INFORMATION (this is information about you or your business, as the issuer of the 1099)

Payer Legal Name ¹	Payer Trade Name ² (if applicable)	Payer tax ID ³	Street Address	City	State	Zip	Phone	Email
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¹ Payer Legal Name Your name as an individual (if sole proprietor or Single Member LLC) or your business name (if a corporation, partnership, multi-member LLC, etc)

² Payer Trade Name Your company DBA or the name of your Single Member LLC

³ Payer tax ID Your tax ID - either your SSN or FEIN number.

⁴ Email The email you want shown on the recipients' 1099 for them to use if they have questions

RECIPIENTS INFORMATION (this is information about the people or businesses whom you paid)

Payment for ¹ (see choices below)	Recipient Name	Type of tax ID ²	Recipient tax ID ³	Recipient Trade Name ⁴ (if applicable)	Street Address	Address Line 2	City	State	Zip	Recipient's Email	Box 1 Amount paid ⁵	Box 6a Work State ⁶ (2 letters)
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¹ Payment for enter "Services" or "Rent" or "Interest" or "Royalty"

² Type of tax ID enter "EIN" or "SSN"

³ Recipient tax ID Either an SSN or FEIN number.

⁴ Recipient Trade Name example: DBA, name of Single Member LLC, etc

⁵ Box 1 Amount paid Do not include payments made through PayPal, Venmo, credit cards or debit cards

⁶ Box 6a State What state was the vendor in when they did the work? If multiple states, make separate 1099 for each state.