# Annual Summary and Transmittal of U.S. Information Returns

### Paperwork Reduction Act Notice

We ask for this information to carry out the Internal Revenue laws of the United States. We need it to ensure that taxpayers are complying with these laws and to allow us to figure and collect the right amount of tax. You are required to give us this information.

### For Official Use Only

[Blank fields]

Under penalties of perjury, I declare that I have examined this return and accompanying documents, and, to the best of my knowledge and belief, they are true, correct, and complete. In the case of documents without recipients' identification numbers, I have complied with the requirements of the law in attempting to secure such numbers from the recipients.

**Signature** .......................................................... **Title** .......................................................... **Date** ..........................................................

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## Instructions

**Changes You Should Note.**—Form 1096 has been reformatted. Please take care in making entries in the proper boxes. A new Box 5, "Total amount reported with this Form 1096," has been added. No entry is required if you are filing Form 1099-A or 1099-G. For all other forms, enter in Box 5 of Form 1096 the total of the amounts from the specific boxes of the forms listed below:

- **Form W-2G**
- **Form 1098**
- **Form 1099-B**
- **Form 1099-DIV**
- **Form 1099-INT**
- **Form 1099-MISC**
- **Form 1099-OID**
- **Form 1099-PATR**
- **Form 1099-R**
- **Form 5498**

**Purpose of Form.**—Use this form to transmit Forms W-2G, 1098, 1099, and 5498 to the Internal Revenue Service.

**Completing Form 1096.**—If you have received a preprinted label from IRS, place it in the name and address area of the form using the brackets as indicators. Make any necessary corrections to your name and address on the label. However, do not use the label if the taxpayer identification number shown is incorrect. If you are not using a preprinted label, enter the filer's name, address, and taxpayer identification number (TIN) in the spaces provided on the form. A filer includes a payer, a recipient of mortgage interest payments, a broker, a barter exchange, a trustee or issuer of an individual retirement arrangement (including an IRA or SEP), and a lender who acquires an interest in secured property or who has reason to know that the property has been abandoned. Individuals not in a trade or business should enter their social security number in Box 2; sole proprietors and all others should enter their employer identification number in Box 1. However, sole proprietors who are not required to have an employer identification number should enter their social security number in Box 2.

Group the forms by form number and submit each group with a separate Form 1096. For example, if you must file both Forms 1099-DIV and Forms 1099-INT, complete one Form 1096 to transmit your Forms 1099-DIV and another Form 1096 to transmit your Forms 1099-INT.

In Box 3, enter the number of forms you are transmitting with this Form 1096. Do not include blank or voided forms in your total. Enter the number of correctly completed forms, not the number of pages, being transmitted. For example, if you send one page of three-to-a-page Forms 5498 with a Form 1096 and you have correctly completed two Forms 5498 on that page, enter 2 in Box 3 of Form 1096. Check the appropriate box to indicate the type of form you are transmitting.

If you are filing a Form 1096 for corrected information returns, enter an "X" in the CORRECTED box at the top of this form.

For more information about filing, see the separate Instructions for Forms 1099, 1098, 5498, 1096, and W-2G.
Where To File.—Send all information returns filed on magnetic media to: Magnetic Media Reporting, Internal Revenue Service, National Computer Center, P.O. Box 1359, Martinsburg, WV 25401-1359. Send all information returns filed on paper to the following:

If your principal business, office or agency, or legal residence in the case of an individual, is located in

Use the following Internal Revenue Service Center address

<table>
<thead>
<tr>
<th>Location</th>
<th>Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alabama, Florida, Georgia, Mississippi, South Carolina</td>
<td>Atlanta, GA 31101</td>
</tr>
<tr>
<td>New Jersey, New York (New York City and counties of Nassau, Rockland, Suffolk, and Westchester)</td>
<td>Holtsville, NY 00501</td>
</tr>
<tr>
<td>New York (all other counties), Connecticut, Maine, Massachusetts, Minnesota, New Hampshire, Rhode Island, Vermont</td>
<td>Andover, MA 05501</td>
</tr>
<tr>
<td>Illinois, Iowa, Missouri, Wisconsin</td>
<td>Kansas City, MO 64999</td>
</tr>
<tr>
<td>Delaware, District of Columbia, Maryland, Pennsylvania</td>
<td>Philadelphia, PA 19255</td>
</tr>
<tr>
<td>Kentucky, Michigan, Ohio, West Virginia</td>
<td>Cincinnati, OH 45999</td>
</tr>
<tr>
<td>Kansas, Louisiana, New Mexico, Oklahoma, Texas</td>
<td>Austin, TX 73301</td>
</tr>
<tr>
<td>California (all other counties), Hawaii</td>
<td>Fresno, CA 93888</td>
</tr>
<tr>
<td>Arkansas, Indiana, North Carolina, Tennessee, Virginia</td>
<td>Memphis, TN 37501</td>
</tr>
</tbody>
</table>

If you have no legal residence or principal place of business in any Internal Revenue district, file with the Internal Revenue Service Center, Philadelphia, PA 19255.