

Form 1096 Department of the Treasury Internal Revenue Service	Annual Summary and Transmittal of U.S. Information Returns	OMB No 1545-0108 1988
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<div style="border: 1px solid black; padding: 5px;"> <input type="checkbox"/> Type or machine print FILER'S name (or attach label) </div> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> Street address PLACE LABEL HERE </div> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> City, state, and ZIP code </div>	<div style="border: 1px solid black; padding: 5px;"> 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. </div>
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If you are not using a preprinted label, enter in Box 1 or 2 below the identification number you used as the filer on the information returns being transmitted. Do not fill in both Boxes 1 and 2.		For Official Use Only <div style="border: 2px solid black; width: 100px; height: 20px; margin: 0 auto;"></div>
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1 Employer identification number	2 Social security number	3 Total number of documents	4 Federal income tax withheld \$	5 Total amount reported with this Form 1096 \$
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Check only one box below to indicate the type of forms being transmitted.												
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
W-2G 32	1098 81	1099-A 80	1099-B 79	1099-DIV 91	1099-G 86	1099-INT 92	1099-MISC 95	1099-OID 96	1099-PATR 97	1099-R 98	1099-S 75	5498 28

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 _____

Please return this entire page to the Internal Revenue Service. Photocopies are NOT acceptable.

Instructions

Change You Should Note.—Form 1096 is now used to transmit new **Form 1099-S**, Statement for Recipients of Proceeds From Real Estate Transactions.

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 (TIN) shown is incorrect. If you are not using a preprinted label, enter the filer's name, address, and 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 person reporting real estate transactions, 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.

No entry is required in Box 5 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	Box 1
Form 1098	Box 1
Form 1099-B	Boxes 2, 3, and 6
Form 1099-DIV	Boxes 1, 8, and 9
Form 1099-INT	Boxes 1 and 3
Form 1099-MISC	Boxes 1, 2, 3, 5, 6, 7, and 8
Form 1099-OID	Boxes 1 and 2
Form 1099-PATR	Boxes 1, 2, 3, and 5
Form 1099-R	Boxes 1 and 8
Form 1099-S	Box 2
Form 5498	Boxes 1 and 2

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

When To File.—File Form 1096 with Forms 1098, 1099, or W-2G by February 28, 1989. File Form 1096 with Forms 5498 by May 31, 1989.

Where To File.—Send all information returns filed on magnetic media to: Magnetic Media Reporting, Internal Revenue Service, 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
▼	▼
Alabama, Florida, Georgia, Mississippi, South Carolina	Atlanta, GA 39901
New Jersey, New York (New York City and counties of Nassau, Rockland, Suffolk, and Westchester)	Holtsville, NY 00501
New York (all other counties), Connecticut, Maine, Massachusetts, Minnesota, New Hampshire, Rhode Island, Vermont	Andover, MA 05501
Illinois, Iowa, Missouri, Wisconsin	Kansas City, MO 64999
Delaware, District of Columbia, Maryland, Pennsylvania	Philadelphia, PA 19255

Kentucky, Michigan, Ohio, West Virginia	Cincinnati, OH 45999
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Kansas, Louisiana, New Mexico, Oklahoma, Texas	Austin, TX 73301
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Alaska, Arizona, California (counties of Alpine, Amador, Butte, Calaveras, Colusa, Contra Costa, Del Norte, El Dorado, Glenn, Humboldt, Lake, Lassen, Marin, Mendocino, Modoc, Napa, Nevada, Placer, Plumas, Sacramento, San Joaquin, Shasta, Sierra, Siskiyou, Solano, Sonoma, Sutter, Tehama, Trinity, Yolo, and Yuba), Colorado, Idaho, Montana, Nebraska, Nevada, North Dakota, Oregon, South Dakota, Utah, Washington, Wyoming	Ogden, UT 84201
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California (all other counties), Hawaii	Fresno, CA 93888
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Arkansas, Indiana, North Carolina, Tennessee, Virginia	Memphis, TN 37501
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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.