

Form 1096 Department of the Treasury Internal Revenue Service	Annual Summary and Transmittal of U.S. Information Returns	OMB No. 1545-0108 1992
<div style="display: flex; justify-content: space-between;"> <div style="writing-mode: vertical-rl; transform: rotate(180deg); font-weight: bold; font-size: small;">ATTACH IRS LABEL HERE</div> <div style="border: 1px solid black; padding: 5px; width: 90%;"> <p><input type="checkbox"/> FILER'S name</p> <p>Street address (including room or suite number)</p> <p>City, state, and ZIP code</p> </div> </div>		
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.		Name of person to contact if the IRS needs more information Telephone number ()
1 Employer identification number		2 Social security number
3 Total number of forms		4 Federal income tax withheld \$
5 Total amount reported with this Form 1096 \$		For Official Use Only <div style="display: flex; justify-content: center; gap: 10px;"> <div style="border: 2px solid black; width: 20px; height: 20px;"></div> <div style="border: 2px solid black; width: 20px; height: 20px;"></div> <div style="border: 2px solid black; width: 20px; height: 20px;"></div> <div style="border: 2px solid black; width: 20px; height: 20px;"></div> <div style="border: 2px solid black; width: 20px; height: 20px;"></div> <div style="border: 2px solid black; width: 20px; height: 20px;"></div> <div style="border: 2px solid black; width: 20px; height: 20px;"></div> </div>
Check only one box below to indicate the type of form being transmitted.		
<input type="checkbox"/> W-2G 32	<input type="checkbox"/> 1098 81	<input type="checkbox"/> 1099-A 80
<input type="checkbox"/> 1099-B 79	<input type="checkbox"/> 1099-DIV 91	<input type="checkbox"/> 1099-G 86
<input type="checkbox"/> 1099-INT 92	<input type="checkbox"/> 1099-MISC 95	<input type="checkbox"/> 1099-OID 96
<input type="checkbox"/> 1099-PATR 97	<input type="checkbox"/> 1099-R 98	<input type="checkbox"/> 1099-S 75
<input type="checkbox"/> 5498 28	If this is your FINAL return, check here <input type="checkbox"/>	

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

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.

Signature ▶ _____ Title ▶ _____ Date ▶ _____

Instructions

Purpose of Form.—Use this form to transmit paper Forms 1099, 1098, 5498, and W-2G to the Internal Revenue Service. DO NOT USE FORM 1096 TO TRANSMIT MAGNETIC MEDIA. See **Form 4804**, Transmittal of Information Returns Reported Magnetically/Electronically.

Use of Preprinted Label.—If you received a preprinted label from the IRS with Package 1099, place the label in the name and address area of this form inside the brackets. Make any necessary changes to your name and address on the label. However, do not use the label if the taxpayer identification number (TIN) shown is incorrect. **Do not prepare your own label. Use only the IRS-prepared label that came with your Package 1099.**

If you are not using a preprinted label, enter the filer's name, address (including room, suite, or other unit number), and TIN in the spaces provided on the form.

Filer.—The name, address, and TIN of the filer on this form must be the same as those you enter in the upper left area of Form 1099, 1098, 5498, or W-2G. A filer includes a payer, a recipient of mortgage interest payments (including points), 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.

Transmitting to the IRS.—Group the forms by form number and transmit each group with a separate Form 1096. For example, if you must file both Forms 1098 and 1099-A, complete one Form 1096 to transmit your Forms 1098 and another Form 1096 to transmit your Forms 1099-A. You need not submit original and corrected returns separately.

Box 1 or 2.—Complete only if you are not using a preprinted IRS label. Individuals not in a trade or business must enter their social security number in Box 2; sole proprietors and all others must enter their employer identification number in Box 1. However, sole proprietors who do not have an employer identification number must enter their social security number in Box 2.

Box 3.—Enter the number of forms you are transmitting with this Form 1096. Do not include blank or voided forms or the Form 1096 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.

Box 4.—Enter the total Federal income tax withheld shown on the forms being transmitted with this Form 1096.

Box 5.—No entry is required if you are filing Form 1099-A or 1099-G. For all other forms, enter the total of the amounts from the specific boxes of the forms listed below:

Form W-2G	Box 1
Form 1098	Boxes 1 and 2
Form 1099-B	Boxes 2 and 3
Form 1099-DIV	Boxes 1a, 5, and 6
Form 1099-INT	Boxes 1 and 3
Form 1099-MISC	Boxes 1, 2, 3, 5, 6, 7, 8, and 10
Form 1099-OID	Boxes 1 and 2
Form 1099-PATR	Boxes 1, 2, 3, and 5
Form 1099-R	Box 1
Form 1099-S	Box 2
Form 5498	Boxes 1 and 2

Final Return.—If you will not be required to file Forms 1099, 1098, 5498, or W-2G in the future, either on paper or on magnetic media, please check the “FINAL return” box.

Type of Form.—Check the appropriate box to indicate the type of form you are transmitting.

Corrected Returns.— For information about filing corrections, see the Instructions for Forms 1099, 1098, 5498, and W-2G. Originals and corrections of the same type of return can be submitted using one Form 1096.

When To File.—File Form 1096 with Forms 1098, 1099, or W-2G by March 1, 1993. File Form 1096 with Forms 5498 by May 31, 1993.

Where To File.—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



Florida, Georgia, 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, New Hampshire, Rhode Island, Vermont	Andover, MA 05501

Illinois, Iowa, Minnesota, Missouri, Wisconsin	Kansas City, MO 64999
Delaware, District of Columbia, Maryland, Pennsylvania, Virginia	Philadelphia, PA 19255
Indiana, Kentucky, Michigan, Ohio, West Virginia	Cincinnati, OH 45999
Kansas, New Mexico, Oklahoma, Texas	Austin, TX 73301
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
California (all other counties), Hawaii	Fresno, CA 93888
Alabama, Arkansas, Louisiana, Mississippi, North Carolina, Tennessee	Memphis, TN 37501

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.