

# Urke & Stoller, LLP

CERTIFIED PUBLIC ACCOUNTANTS

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2023  
1099

Form 1099 Filing Requirement for: \_\_\_\_\_  
(Company Name)

**IRS FILING DUE DATE IS JANUARY 31, 2024:** You may need to file information returns. For all corporations, partnerships, limited liability companies, tax-exempt organizations, sole proprietorships, trusts, and estates (but not for investment real estate rentals), the IRS has made the following questions a part of the tax returns:

- “Did you make any payments that would require you to file Form(s) 1099?”
- “If ‘Yes’, did you or will you file all required Forms 1099?”

If the questions are left blank on the tax return, your tax return will be considered incomplete. **An incomplete tax return has no statute of limitations and is open to an IRS audit forever.** As preparers of your tax return, we are not allowed to answer the questions on your behalf unless you have provided us with the answer. Please take the time to read the **1099 Reporting Requirements**.

If Urke & Stoller, LLP, is to prepare your income tax return this year, please check one of the boxes below, sign and date this form, and return it to us by e-mail to [JeanC@urkecpa.com](mailto:JeanC@urkecpa.com) or fax to **(602)-867-6011**.

- I am required to file Form(s) 1099 and would like Urke & Stoller, LLP to prepare them for me. **Complete information must be sent to our office as soon as possible. To prepare forms please send: Year-End QB File with vendor information complete; legal name, EIN and address; or Complete 1099 Vendor Information Worksheet.**
- I am required to file Form(s) 1099, and I will prepare and file the forms myself.
- I am not required to file any Form(s) 1099-NEC, 1099-A, 1099-B, 1099-C, 1099-R, 1099-DIV, 1099-INT, 1099-MISC, 1099-NEC,1042-S, 1095-B or C.

The 1099 Forms must be postmarked or e-mailed to your payees and to the IRS by **January 31, 2024**. **The IRS will impose penalties** for missing these deadlines, or for omitting a payee’s tax identification number. If for any reason we are unable to complete any 1099 forms due to lack of timely information, we will not assume any liability for penalties associated with a failure to file.

Please call our office or e-mail us if you have questions about this year’s filing requirements. Thank you,

Authorized by:

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Print name

\_\_\_\_\_  
Date