

Urke & Stoller, LLP

CERTIFIED PUBLIC ACCOUNTANTS

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2023
1099

Dear clients,

We want to remind you that 2023 FORMS 1099 NEED TO BE FILED WITH THE IRS BY JANUARY 31, 2024.

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 or fax to **(602)-867-6011**.

- 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.

Authorized by:

Signature

Print name

Date

If you are required to file 1099 forms, there are different easy options online you can use to prepare them. You are welcome to search online and select the one that works best with your needs and budget.

Here are a few options we have used that you can consider:

<https://www.tax1099.com>

<https://www.track1099.com>

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.

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

Thank you,

Jean Campbell