

1099s, W-2s, Payroll Returns Checklist

We request you fill out the following checklist for preparing forms: **1099s, W-2s, & Payroll Returns**. Please check the appropriate box as to whom you would like to do each procedure. It helps make sure all forms are completed in a timely manner and avoids confusion during a busy tax season.

INFORMATION RETURNS:

	Prepared by Client	Prepared by MCS	N/A
Prepare 1099s / 1096	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Prepare W-2s / W-3s	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

PAYROLL TAX RETURNS:

Prepare 943 – Farmers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Prepare 941 – Non-Farmers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Prepare 940 – Federal Unemployment (if required)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

****If any Payroll Tax Returns are to be completed by MURPHY, COE & SMITH, PLLC, please include all deposits made, date(s) and amount(s) here:**

Deposit Type	Date	Amount		Deposit Type	Date	Amount
1) _____				7) _____		
2) _____				8) _____		
3) _____				9) _____		
4) _____				10) _____		
5) _____				11) _____		
6) _____				12) _____		

Client will pick up 1099s and/or W-2s

MURPHY, COE & SMITH, PLLC will mail 1099s and/or W-2s to recipients.
(Postage will be billed to client.)

MURPHY, COE & SMITH, PLLC will mail all 1099s and/or W-2s to the payer

The recipients are clients of MCS, please put their 1099s and/or W-2s in their files.

Print Name **Signature** **Date** **Phone**

Note: Items must be returned to MURPHY, COE & SMITH, PLLC prior to **January 10th, 2025** to assure timely mailing and e-filing of forms.

W-2s

NAME	ADDRESS	SS#	GROSS WAGES	COMMODITY WAGES	DEDUCTIONS		
					FICA	FED	STATE

FORM 1099

NAME	ADDRESS	SS#	SPECIFY-INTEREST, RENT, OR NON-EMPLOYEE COMP	LIST IF \$600 OR MORE TOTAL AMOUNT PAID - \$10 OR MORE FOR INTEREST

YOUR NAME

YOUR ADDRESS

YOUR EMPLOYER ID NUMBER