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	☐	☐	☐
Prepare W-2s / W-3s	☐	☐	☐
PAYROLL TAX RETURNS:			
Prepare 944 - Individual/Farmer	☐	☐	☐
Prepare 943 - Farmers	☐	☐	☐
Prepare 941 - Non-Farmers	☐	☐	☐
Prepare 940 - Federal Unemployment (if required)	☐	☐	☐

***If any Payroll Tax Returns are to be completed by MCS, 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 ☐

MCS will mail 1099s and/or W-2s to recipients. ☐
(Postage will be billed to the client.)

MCS will mail or email all 1099s and/or W-2s to the payer. ☐
email(s):_____

_____

Any special instructions: _____

Print Name	***Signature***	***Date***	***Phone* Number:**

Items must be returned to MCS prior to *January 12, 2027,* to assure timely mailing and e-filing of forms.

W-2s

NAME	ADDRESS	SS#	GROSS WAGES	NET WAGES	COMMODITY WAGES	DEDUCTIONS FICA	FEDERAL	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 _____