

GINA L. GWOZDZ, CPA

Specializing in Minimizing Your Taxes

I appreciate the opportunity to provide year end Form 1099 service to you. To ensure an understanding between us, this letter sets forth the terms of our engagement as well as the nature and limitations of my services to you.

Form 1099 Services: I will prepare and electronically submit Form 1099-MISC, Form 1099-INT and/or Form 1099-DIV based on the information you provide to me. You may be required to file other form 1099s that I will not prepare. It is your responsibility to determine and file any other Form 1099s.

My responsibility: I will prepare and electronically submit Form 1099-MISC, Form 1099-INT and/or Form 1099-DIV based on the information you provide to me. I will email you a PDF copy of the forms for you to distribute to the recipients. I will email you a copy of the forms for you to keep for your records. I will maintain copies of the forms for my records for three years.

Your responsibility: You will timely provide me with legible and accurate employer and recipient information. After I prepare the Form 1099s I will email a copy for your review. You will promptly review these forms and inform me of any changes. **You will distribute or mail the recipient copies to the recipients by January 31.** You will retain your copy for at least 5 years.

Filing Services: By signing this form you authorize me to electronically file the forms to the Internal Revenue Service.

My fees: My fee for this service is \$20 for type of form (Form 1099-MISC, Form 1099-INT, Form 1099-DIV) and \$5 for each recipient. Payment of my fee is due in advance, before I will begin this service.

Services not provided: I will not audit or verify the information that you provide to me. If an amount appears unusual, I will call it to your attention. However, I am not responsible for the detection of errors, irregularities, theft, fraud or illegal acts. I do not provide legal services. I will not audit, verify or otherwise determine if you should be filing other Form 1099s or who should or should not receive a Form 1099.

Approvals: I am pleased to have you as a Form 1099 client and hope that this will begin a long and pleasant association. Each of us, however, retains the right to terminate this engagement at any time. Please date and sign a copy of this letter and return it to me to acknowledge your agreement with the terms of this engagement.

Sincerely,

Acknowledged:

[Client]

[Date]

CONTRACTOR INFORMATION SHEET

Complete this form for each 1099 contractor.

General Information

Contractor Type	<input type="radio"/> Individual <input type="radio"/> Business
Contractor Name	_____
Address	_____
City, State, Zip	_____
Email Address	_____
Social Security No./ Employer Identification No.	_____

Pay Information

Form 1099-MISC		Amount
Rent		
Royalties		
Healthcare payments		
Attorney proceeds		
Non-employee compensation		
Reimbursement amount		
Federal Tax Withheld		
State Tax Withheld		
Form 1099-INT		Amount
Interest Income		
Federal Tax Withheld		
State Tax Withheld		
Form 1099-DIV		Amount
Qualified Dividends		
Capital Gain Dividends		
Non-dividend Distributions		
Non-cash liquidation Distributions		
Investment Expenses		
Federal Income Tax Withheld		
State Tax Withheld		

Notes