



2001

Package 1099

How To Get Forms 1099, 1096, 1098, 5498, and W-2G

This package contains:

- **Quick and Easy Access to Tax Help and Forms**
- **Forms Available by Fax** (other than forms processed by optical character recognition equipment)
- **Form 7018-C**, Order Blank for Forms
- **Preadressed Form 1096**

Note: *Your name, address, and employer identification number (EIN) are preprinted on Form 1096. If any of the information is incorrect, make corrections on the form.*

How To Get Forms 1099, 1096, 1098, 5498, W-2G, and Instructions

Caution: *Because the IRS processes paper forms by machine (optical character recognition equipment), you cannot file with the IRS Forms 1096, 1098, 1099, or 5498 that you print from the IRS Web Site.*

- By phone. Call 1-800-TAX-FORM (1-800-829-3676).
- By personal computer. See **Quick and Easy Access to Tax Help and Forms**.

- By order blank. Complete Form 7018-C in this package or order online (see page 2 of Form 7018-C).

A number of commercial office product stores offer computer-printed versions of IRS forms for a small fee. Check your local telephone directory for sources.

How To File Forms 1098, 1099, 5498, and W-2G Electronically

You can now file Forms 1098, 1099, 5498, and W-2G electronically through the Filing Information Returns Electronically (FIRE) system. For information concerning the FIRE system, go to www.irs.gov/elec_svs/fire-sys.html. Also, you can now file most of these forms online through the approved IRS e-file for Business Providers. Go to www.irs.gov/elec_svs/abp.html to choose a vendor that offers online filing.

Deliver to Accounting, Bookkeeping, or Tax Dept.

Internal Revenue Service
Central Area Distribution Center
P.O. Box 8905
Bloomington, IL 61702-8905

Form 1096 has been preprinted with your name, address, and employer identification number (EIN). Make any corrections on the form. If you file additional Forms 1096, fill in your name, address, and EIN.

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Package 1099

Cat. No. 63318P

Quick and Easy Access to Tax Help and Forms



Personal Computer

You can access the IRS Web Site 24 hours a day, 7 days a week, at www.irs.gov to:

- Download forms, instructions, and publications
- See answers to frequently asked tax questions
- Search publications online by topic or keyword
- Figure your withholding allowances using our W-4 calculator
- Send us comments or request help via e-mail
- Sign up to receive local and national tax news by e-mail

You can also reach us using File Transfer Protocol at <ftp.irs.gov>



Fax

You can get over 100 of the most requested forms and instructions 24 hours a day, 7 days a week, by fax. Just call **703-368-9694** from the telephone connected to the fax machine. See pages 4 and 5 for a list of the items available.



Mail

See **Form 7018-C**, Order Blank for Forms, in this package.



Phone

You can get forms, publications, and automated information 24 hours a day, 7 days a week, by phone.

Forms and Publications

Call **1-800-TAX-FORM** (1-800-829-3676) to order current and prior year forms, instructions, and publications. You should receive your order within 10 days.

TeleTax Topics

Call **1-800-829-4477** to listen to pre-recorded messages covering about 150 tax topics.



Walk-in

You can pick up some of the most requested forms, instructions, and publications at many post offices, libraries, and IRS offices. Some IRS offices, libraries, grocery stores, office supply stores, and copy centers have an extensive collection of products available to photocopy or print from a CD-ROM.



CD-ROM

Order **Pub. 1796**, Federal Tax Products on CD-ROM, and get:

- Current year forms, instructions, and publications
- Prior year forms, instructions, and publications
- Popular forms that may be filled in electronically, printed out for submission, and saved for recordkeeping

Buy the CD-ROM on the Internet at www.irs.gov/cdorders from the National Technical Information Service (NTIS) for \$21 (no handling fee), or call **1-877-CDFORMS** (1-877-233-6767) toll free to buy the CD-ROM for \$21 (plus a \$5 handling fee).

Forms by Fax

The following forms and instructions are available through our **Tax Fax** service 24 hours a day, 7 days a week. Just call **703-368-9694** from the telephone connected to the fax machine. When you call, you will hear instructions on how to use the service. Select the option for getting forms. Then, enter the **Catalog Number** (Cat. No.) shown below for each item you want. When you hang up the phone, the fax will begin.

Name of Form or Instructions	Title of Form or Instructions	Cat. No.	No. of Pages	Name of Form or Instructions	Title of Form or Instructions	Cat. No.	No. of Pages
Form SS-4	Application for Employer Identification Number	16055	4	Schedule A (Form 990)	Organization Exempt Under Section 501(c)(3)	11285	6
Form SS-8	Determination of Worker Status for Purposes of Federal Employment Taxes and Income Tax Withholding	16106	4	Instr. Sch. A (Form 990)		11294	8
Form W-2c	Corrected Wage and Tax Statement	61437	8	Form 990-EZ	Short Form Return of Organization Exempt From Income Tax	10642	2
Form W-3c	Transmittal of Corrected Wage and Tax Statements	10164	2	Instr. 990-EZ	Specific Instructions for Form 990-EZ	50003	9
Instr. W-2c and W-3c		25978	4	Form 1040	U.S. Individual Income Tax Return	11320	2
Form W-4	Employee's Withholding Allowance Certificate	10220	2	Instr. 1040	Line Instructions for Form 1040	11325	34
Form W-4P	Withholding Certificate for Pension or Annuity Payments	10225	4	Instr. 1040	General Information for Form 1040	24811	26
Form W-5	Earned Income Credit Advance Payment Certificate	10227	3	Tax Table and Tax Rate Sch.	Tax Table and Tax Rate Schedules (Form 1040)	24327	13
Form W-7	Application for IRS Individual Taxpayer Identification Number	10229	3	Schedules A&B (Form 1040)	Itemized Deductions & Interest and Ordinary Dividends	11330	2
Form W-7A	Application for Taxpayer Identification Number for Pending U.S. Adoptions	24309	2	Instr. Sch. A&B		24328	8
Form W-7P	Application for Preparer Tax Identification Number	26781	1	Schedule C (Form 1040)	Profit or Loss From Business (Sole Proprietorship)	11334	2
Form W-9	Request for Taxpayer Identification Number and Certification	10231	2	Instr. Sch. C		24329	8
Instr. W-9		20479	2	Schedule C-EZ (Form 1040)	Net Profit From Business (Sole Proprietorship)	14374	2
Form W-9S	Request for Student's or Borrower's Taxpayer Identification Number and Certification	25240	2	Schedule D (Form 1040)	Capital Gains and Losses	11338	2
Form W-10	Dependent Care Provider's Identification and Certification	10437	1	Instr. Sch. D		24331	8
Form 709	U.S. Gift (and Generation-Skipping Transfer) Tax Return	16783	4	Schedule D-1 (Form 1040)	Continuation Sheet for Schedule D	10424	2
Instr. 709		16784	8	Schedule E (Form 1040)	Supplemental Income and Loss	11344	2
Form 709A	U.S. Short Form Gift Tax Return	10171	2	Instr. Sch. E		24332	6
Form 843	Claim for Refund and Request for Abatement	10180	1	Schedule EIC (Form 1040A or 1040)	Earned Income Credit	13339	2
Instr. 843		11200	2	Schedule F (Form 1040)	Profit or Loss From Farming	11346	2
Form 940	Employer's Annual Federal Unemployment (FUTA) Tax Return	11234	2	Instr. Sch. F		24333	7
Instr. 940		13660	6	Schedule H (Form 1040)	Household Employment Taxes	12187	2
Form 940-EZ	Employer's Annual Federal Unemployment (FUTA) Tax Return	10983	2	Instr. Sch. H		21451	8
Instr. 940-EZ		25947	4	Schedule J (Form 1040)	Farm Income Averaging	25513	2
Form 941	Employer's Quarterly Federal Tax Return	17001	3	Instr. Sch. J		25514	8
Instr. 941		14625	4	Schedule R (Form 1040)	Credit for the Elderly or the Disabled	11359	2
Form 941c	Supporting Statement To Correct Information	11242	4	Instr. Sch. R		11357	4
Form 990	Return of Organization Exempt From Income Tax	11282	6	Schedule SE (Form 1040)	Self-Employment Tax	11358	2
Instr. 990 & 990-EZ	General Instructions for Forms 990 and 990-EZ	22386	14	Instr. Sch. SE		24334	4
Instr. 990	Specific Instructions for Form 990	50002	16	Form 1040A	U.S. Individual Income Tax Return	11327	2
				Schedule 1 (Form 1040A)	Interest and Ordinary Dividends for Form 1040A Filers	12075	1
				Schedule 2 (Form 1040A)	Child and Dependent Care Expenses for Form 1040A Filers	10749	2
				Instr. Sch. 2		30139	3
				Schedule 3 (Form 1040A)	Credit for the Elderly or the Disabled for Form 1040A Filers	12064	2
				Instr. Sch. 3		12059	4
				Form 1040-ES	Estimated Tax for Individuals	11340	7
				Form 1040EZ	Income Tax Return for Single and Joint Filers With No Dependents	11329	2

Name of Form or Instructions	Title of Form or Instructions	Cat. No.	No. of Pages	Name of Form or Instructions	Title of Form or Instructions	Cat. No.	No. of Pages
Form 1040NR	U.S. Nonresident Alien Income Tax Return	11364	5	Form 6198	At-Risk Limitations	50012	1
Instr. 1040NR		11368	32	Instr. 6198		50013	7
Form 1040NR-EZ	U.S. Income Tax Return for Certain Nonresident Aliens With No Dependents	21534	2	Form 6251	Alternative Minimum Tax—Individuals	13600	2
Instr. 1040NR-EZ		21718	12	Instr. 6251		64277	8
Form 1040-V	Payment Voucher	20975	2	Form 6252	Installment Sale Income	13601	2
Form 1040X	Amended U.S. Individual Income Tax Return	11360	2	Instr. 6252		64262	2
Instr. 1040X		11362	6	Form 6781	Gains and Losses From Section 1256 Contracts and Straddles	13715	3
Form 1116	Foreign Tax Credit	11440	2	Form 8271	Investor Reporting of Tax Shelter Registration Number	61924	2
Instr. 1116		11441	12	Form 8283	Noncash Charitable Contributions	62299	2
Form 1310	Statement of Person Claiming Refund Due a Deceased Taxpayer	11566	2	Instr. 8283		62730	4
Form 2106	Employee Business Expenses	11700	2	Form 8300	Report of Cash Payments Over \$10,000 Received in a Trade or Business	62133	4
Instr. 2106		64188	4	Form 8332	Release of Claim to Exemption for Child of Divorced or Separated Parents	13910	1
Form 2106-EZ	Unreimbursed Employee Business Expenses	20604	2	Form 8379	Injured Spouse Claim and Allocation	62474	2
Form 2120	Multiple Support Declaration	11712	1	Form 8582	Passive Activity Loss Limitations	63704	3
Form 2210	Underpayment of Estimated Tax by Individuals, Estates, and Trusts	11744	3	Instr. 8582		64294	12
Instr. 2210		63610	6	Form 8586	Low-Income Housing Credit	63987	2
Form 2290	Heavy Highway Vehicle Use Tax Return	11250	3	Form 8606	Nondeductible IRAs	63966	2
Instr. 2290		27231	8	Instr. 8606		25399	8
Form 2441	Child and Dependent Care Expenses	11862	2	Form 8615	Tax for Children Under Age 14 Who Have Investment Income of More Than \$1,400	64113	1
Instr. 2441		10842	3	Instr. 8615		28914	2
Form 2553	Election by a Small Business Corporation	18629	2	Form 8718	User Fee for Exempt Organization Determination Letter Request	64728	1
Instr. 2553		49978	2	Form 8801	Credit for Prior Year Minimum Tax—Individuals, Estates, and Trusts	10002	4
Form 2555	Foreign Earned Income	11900	3	Form 8809	Request for Extension of Time To File Information Returns	10322	2
Instr. 2555		11901	4	Form 8812	Additional Child Tax Credit	10644	2
Form 2555-EZ	Foreign Earned Income Exclusion	13272	2	Form 8814	Parents' Election To Report Child's Interest and Dividends	10750	2
Instr. 2555-EZ		14623	3	Form 8815	Exclusion of Interest From Series EE and I U.S. Savings Bonds Issued After 1989	10822	2
Form 2688	Application for Additional Extension of Time To File U.S. Individual Income Tax Return	11958	2	Form 8822	Change of Address	12081	2
Form 2848	Power of Attorney and Declaration of Representative	11980	2	Form 8824	Like-Kind Exchanges	12311	4
Instr. 2848		11981	4	Form 8829	Expenses for Business Use of Your Home	13232	1
Form 3903	Moving Expenses	12490	2	Instr. 8829		15683	4
Form 4136	Credit for Federal Tax Paid on Fuels	12625	4	Form 8839	Qualified Adoption Expenses	22843	2
Form 4137	Social Security and Medicare Tax on Unreported Tip Income	12626	2	Instr. 8839		23077	4
Form 4506	Request for Copy or Transcript of Tax Form	41721	2	Form 8850	Pre-Screening Notice and Certification Request for the Work Opportunity and Welfare-to-Work Credits	22851	2
Form 4562	Depreciation and Amortization	12906	2	Instr. 8850		24833	2
Instr. 4562		12907	12	Form 8853	Medical Savings Accounts and Long-Term Care Insurance Contracts	24091	2
Form 4684	Casualties and Thefts	12997	2	Instr. 8853		24188	8
Instr. 4684		12998	4	Form 8857	Request for Innocent Spouse Relief	24647	4
Form 4797	Sales of Business Property	13086	2	Form 8859	District of Columbia First-Time Homebuyer Credit	24779	2
Instr. 4797		13087	7	Form 8862	Information To Claim Earned Income Credit After Disallowance	25145	2
Form 4835	Farm Rental Income and Expenses	13117	2	Instr. 8862		25343	2
Form 4868	Application for Automatic Extension of Time To File U.S. Individual Income Tax Return	13141	4	Form 8863	Education Credits	25379	3
Form 4952	Investment Interest Expense Deduction	13177	2	Form 9465	Installment Agreement Request	14842	2
Form 4972	Tax on Lump-Sum Distributions	13187	1				
Instr. 4972		13188	3				
Form 5329	Additional Taxes Attributable to IRAs, Other Qualified Retirement Plans, Annuities, Modified Endowment Contracts, and MSAs	13329	2				
Instr. 5329		13330	4				

Order Blank for Forms

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Instructions. Enter the quantity next to the item you are ordering. **Please order the number of forms needed, not the number of sheets. Order 2002 forms on the left side of the form. Order 2001 forms on the right side of the form. Note:** None of the items on the order blank are available from the IRS in continuous feed version. All forms on this order blank that require multiple copies are carbonized. You will receive one instruction with any form on this order blank. **Type or print** your name and complete mail delivery address in the space provided below. An accurate mail delivery address is necessary to ensure delivery of your order.

2002 Forms Only		Title for 2002	Title for 2001	2001 Forms Only	
Quantity	Item			Item	Quantity
	1096	Annual Summary and Transmittal of U.S. Information Returns	Annual Summary and Transmittal of U.S. Information Returns	1096	
	W-2 G	Certain Gambling Winnings	Certain Gambling Winnings	W-2 G	
	1098	Mortgage Interest Statement	Mortgage Interest Statement	1098	
	1098 E	Student Loan Interest Statement	Student Loan Interest Statement	1098 E	
	1098 T	Tuition Payments Statement	Tuition Payments Statement	1098 T	
	1099 A	Acquisition or Abandonment of Secured Property	Acquisition or Abandonment of Secured Property	1099 A	
	1099 B	Proceeds From Broker and Barter Exchange Transactions	Proceeds From Broker and Barter Exchange Transactions	1099 B	
	1099 C	Cancellation of Debt	Cancellation of Debt	1099 C	
	1099 DIV	Dividends and Distributions	Dividends and Distributions	1099 DIV	
	1099 G	Certain Government Payments	Certain Government and Qualified State Tuition Program Payments	1099 G	
	1099 INT	Interest Income	Interest Income	1099 INT	
	1099 LTC	Long-Term Care and Accelerated Death Benefits	Long-Term Care and Accelerated Death Benefits	1099 LTC	
	1099 MISC	Miscellaneous Income	Miscellaneous Income	1099 MISC	
	1099 MSA	Distributions From an Archer MSA or Medicare+Choice MSA	Distributions From an MSA or Medicare+Choice MSA	1099 MSA	
	1099 OID	Original Issue Discount	Original Issue Discount	1099 OID	
	1099 PATR	Taxable Distributions Received From Cooperatives	Taxable Distributions Received From Cooperatives	1099 PATR	
	1099 Q	Qualified Tuition Program Payments (under section 529)			
	1099 R	Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.	Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.	1099 R	
	1099 S	Proceeds From Real Estate Transactions	Proceeds From Real Estate Transactions	1099 S	
	5498	IRA and Coverdell ESA Contribution Information	IRA Contribution Information	5498	
	5498 MSA	Archer MSA or Medicare+Choice MSA Information	MSA or Medicare+Choice MSA Information	5498 MSA	
	5754	Statement by Person(s) Receiving Gambling Wages	Statement by Person(s) Receiving Gambling Wages	5754	

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Purpose of form. Use this form to order items listed on page 1. You may order both 2001 and 2002 forms at the same time. You will not need to reorder your 2002 items because the items will be automatically shipped to you as they become available.

Where To Send Your Order

Send your order to the Internal Revenue Service address for the Area Distribution Center closest to your state.

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Online Ordering

Electronic submission of Form 7018-C can now be made from the IRS Digital Daily web site at www.irs.gov/bus_info/index.html. Each item listed on this online order blank will have a maximum quantity of 1000 forms and 25 instructions that can be ordered. If you require a greater quantity than the maximum allowed, fill out the paper Form 7018-C and mail it to the appropriate Distribution Center.

Paperwork Reduction Act Notice. We ask for the information on this form to carry out the Internal Revenue laws of the United States. Your response is voluntary.

You are not required to provide the information requested on a form that is subject to the Paperwork Reduction Act unless the form displays a valid OMB control number. Books or records relating to a form or its instructions must be retained as long as their contents may become material in the administration of any Internal Revenue law. Generally, tax returns and return information are confidential, as required by Code section 6103.

The time needed to complete and file this form will vary depending on individual circumstances. The estimated average time is 3 minutes. If you have comments concerning the accuracy of this time estimate or suggestions for making this form simpler, we would be happy to hear from you. You can write to the Tax Forms Committee, Western Area Distribution Center, Rancho Cordova, CA 95743-0001.

