

ftwilliam.com 1099 Forms Fulfillment Service Pricing

A \$12.65 batch fee will be added per batch submitted.

Prices on the website are effective from September 1, 2021 through August 31, 2022

| Forms 1099-DIV / 1099-INT / 1099-MISC / 1099-NEC / 1099-R / 1099-SA / 5498 / 5498-SA 2021 Forms Fulfillment Services | | |
|---|--|-----------------------------|
| Service | Description | Cost |
| Federal/State/Payee^ | <ol style="list-style-type: none"> 1. 1099-DIV <ol style="list-style-type: none"> a. 1096/Copy A (e-file) b. Copy B (print & mail) c. State (e-file)*** 2. 1099-INT <ol style="list-style-type: none"> a. 1096/Copy A (e-file) b. Copy B (print & mail) c. State (e-file)*** 3. 1099-MISC <ol style="list-style-type: none"> a. 1096/Copy A (e-file) b. Copy B/2 (print & mail) c. State (e-file)*** 4. 1099-NEC <ol style="list-style-type: none"> a. 1096/Copy A (e-file) b. Copy B/2 (print & mail) c. State (e-file)*** 5. 1099-R <ol style="list-style-type: none"> a. 1096/Copy A (e-file) b. Copy B/C/2 (print & mail) c. State (e-file)*** d. See Volume Discount Pricing below if you have 5,001+ payees. | \$1.90/payee** + Postage |
| Service | Description | Cost |
| Federal/State Only | <ol style="list-style-type: none"> 1. 1099-DIV <ol style="list-style-type: none"> a. 1096/Copy A (e-file) b. State (e-file)*** 2. 1099-INT <ol style="list-style-type: none"> a. 1096/Copy A (e-file) b. State (e-file)*** 3. 1099-MISC <ol style="list-style-type: none"> a. 1096/Copy A (e-file) b. State (e-file)*** 4. 1099-NEC <ol style="list-style-type: none"> a. 1096/Copy A (e-file) b. State (e-file)*** 5. 1099-R <ol style="list-style-type: none"> a. 1096/Copy A (e-file) b. State (e-file)*** | \$1.50/payee** |
| Service | Description | Cost |
| Federal/Payee Only | <ol style="list-style-type: none"> 1. 1099-DIV <ol style="list-style-type: none"> a. 1096/Copy A (e-file) b. Copy B (print & mail) 2. 1099-INT <ol style="list-style-type: none"> a. 1096/Copy A (e-file) b. Copy B (print & mail) 3. 1099-MISC <ol style="list-style-type: none"> a. 1096/Copy A (e-file) b. Copy B/2 (print & mail) 4. 1099-NEC <ol style="list-style-type: none"> a. 1096/Copy A (e-file) | \$1.16/payee** + Postage |

| | b. Copy B/2 (print & mail) 5. 1099-R a. 1096/Copy A (e-file) b. Copy B/C/2 (print & mail) 6. 1099-SA a. 1096/Copy A (e-file) b. Copy B (print & mail) 7. 5498 a. 1096/Copy A (e-file) b. Copy B (print & mail) 8. 5498-SA a. 1096/Copy A (e-file) b. Copy B (print & mail) | |
|--|--|----------------------------------|
| Service | Description | Cost |
| Payee Only (Print & Mail) | 1. 1099-DIV - Copy B 2. 1099-INT - Copy B 3. 1099-MISC - Copy B/2 4. 1099-NEC - Copy B/2 5. 1099-R - Copy B/C/2 6. 1099-SA - Copy B 7. 5498 - Copy B 8. 5498-SA - Copy B | \$0.58/payee** + Postage |
| Service | Description | Cost |
| Federal Only (1096/Copy A e-file) | 1. 1099-DIV 2. 1099-INT 3. 1099-MISC 4. 1099-NEC 5. 1099-R 6. 1099-SA 7. 5498 8. 5498-SA | \$0.70/payee** |
| Service | Description | Cost |
| State Only (e-file)*** | 1. 1099-DIV 2. 1099-INT 3. 1099-MISC 4. 1099-NEC 5. 1099-R | \$0.85/payee** |
| Service | Description | Cost |
| Payer Only (Print & Mail) | 1. 1099-R Copy D 2. 1099-DIV/INT/MISC/NEC/SA/5498/5498-SA | \$7.20/payer + \$0.05/payee** |

| ^Volume Discount Pricing for Federal/State/Payee Option | | |
|---|------------|------------------------|
| Number of Payees | % Discount | Price |
| 0-5,000 | 0% | \$1.90/payee + postage |
| 5,001-10,000 | 5% | \$1.81/payee + postage |
| 10,001-20,000 | 10% | \$1.71/payee + postage |
| 20,001-30,000 | 12% | \$1.67/payee + postage |
| 30,001-UP | 14% | \$1.63/payee + postage |

****NOTE:** The cut-off for all submissions is 12 PM CT on Thursday, January 27, 2022 to ensure the participant copies are printed and mailed timely. You may submit batches after 12 PM CT, on Thursday, January 27, 2022 but we are not able to guarantee the batches will be processed by Monday, January 31, 2022.

*****What do we mean by state 1099 fulfillment?**

1. It is electronic. We do not offer any print and mail services.
2. Many, but not all, states require 1099 fulfillment. These states need to know basic information about 1099-type distributions and recipients. The information sent to the states is approximately equivalent to the Federal 1096 (summary page) form and the Copy A (participant information) forms.
3. In addition, some states also require their own specific 1099 reconciliation form. Often times states are interested in knowing how the distributions occurred for each quarter or month, or other information specific to the needs of that state's tax code or other regulations.
4. We do not offer state-withholding reconciliation forms. These forms (e.g. CT-945) are very similar to the Federal 945 (which we also do not offer an e-file service for). For example, these are often related to 1099 forms because tax can be withheld from distributions shown on a 1099-R form; however, these are not considered a part of state 1099 fulfillment.
5. We do not offer correction services for state 1099 fulfillment. Due to the complexity and rarity in occurrence, we do not offer corrections at this time.