

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, 2020 through August 31, 2021

Forms 1099-DIV / 1099-INT / 1099-MISC / 1099-R / 1099-SA / 5498 2019 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-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. 	\$1.80/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-R <ol style="list-style-type: none"> a. 1096/Copy A (e-file) b. State (e-file)*** 	\$1.44/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-R <ol style="list-style-type: none"> a. 1096/Copy A (e-file) b. Copy B/C/2 (print & mail) 5. 1099-SA <ol style="list-style-type: none"> a. 1096/Copy A (e-file) b. Copy B (print & mail) 6. 5498 <ol style="list-style-type: none"> a. 1096/Copy A (e-file) b. Copy B (print & mail) 	\$1.11/payee** + Postage

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-R - Copy B/C/2 5. 1099-SA - Copy B 6. 5498 - Copy B	\$0.55/payee** + Postage
Service	Description	Cost
Federal Only (1096/Copy A e-file)	1. 1099-DIV 2. 1099-INT 3. 1099-MISC 4. 1099-R 5. 1099-SA 6. 5498	\$0.68/payee**
Service	Description	Cost
State Only (e-file)***	1. 1099-DIV 2. 1099-INT 3. 1099-MISC 4. 1099-R	\$0.83/payee**
Service	Description	Cost
Payer Only (Print & Mail)	1. 1099-R Copy D 2. 1099-DIV/INT/MISC/SA/5498	\$6.85/payer + \$0.05/payee**

^Volume Discount Pricing for Federal/State/Payee Option		
Number of Payees	% Discount	Price
0-5,000	0%	\$1.80/payee + postage
5,001-10,000	5%	\$1.71/payee + postage
10,001-20,000	10%	\$1.62/payee + postage
20,001-30,000	12%	\$1.58/payee + postage
30,001-UP	14%	\$1.55/payee + postage

****NOTE:** There will be an additional 50% charge for submissions made after 5 PM CT on Friday, January 22, 2021. The cut-off for all submissions is 12 PM CT on Thursday, January 28, 2021 to ensure the participant copies are printed and mailed timely. You may submit batches after 12 PM CT, on Thursday, January 28, 2020 but we are not able to guarantee the batches will be processed by Sunday, January 31, 2021.

*****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.