

3131

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PAYER'S/TRUSTEE'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no.		1 Gross distribution	OMB No. 1545-1760	Payments From Qualified Education Programs (Under Sections 529 and 530)
		\$	Form 1099-Q	
		2 Earnings	(Rev. April 2025)	
		\$	For calendar year	
PAYER'S/TRUSTEE'S TIN	RECIPIENT'S TIN	3 Basis	4 Type of transfer:	Copy A For Internal Revenue Service Center For filing information, Privacy Act, and Paperwork Reduction Act Notice, see the General Instructions for Certain Information Returns. www.irs.gov/Form1099
		\$	a <input type="checkbox"/> Trustee-to-trustee b <input type="checkbox"/> QTP to Roth IRA	
RECIPIENT'S name		5 Distribution is from:	6 Check if the recipient is not the designated beneficiary <input type="checkbox"/>	
Street address (including apt. no.)		a <input type="checkbox"/> Private QTP b <input type="checkbox"/> State QTP c <input type="checkbox"/> Coverdell ESA		
City or town, state or province, country, and ZIP or foreign postal code				
Account number (see instructions)				

Form **1099-Q** (Rev. 4-2025)

Cat. No. 32223J

www.irs.gov/Form1099Q

Department of the Treasury - Internal Revenue Service

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FILER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone number		1 Payments received for qualified tuition and related expenses	OMB No. 1545-1574 2025 Form 1098-T
		2	
FILER'S employer identification no.	STUDENT'S TIN <input type="checkbox"/>	3	
STUDENT'S name		4 Adjustments made for a prior year	5 Scholarships or grants
Street address (including apt. no.)		\$	\$
City or town, state or province, country, and ZIP or foreign postal code		6 Adjustments to scholarships or grants for a prior year	7 Checked if the amount in box 1 includes amounts for an academic period beginning January–March 2026 <input type="checkbox"/>
Service Provider/Acct. No. (see instr.)	8 Checked if at least half-time student <input type="checkbox"/>	9 Checked if a graduate student <input type="checkbox"/>	10 Ins. contract reimb./refund \$

Tuition Statement

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For filing information, Privacy Act, and Paperwork Reduction Act Notice, see the **General Instructions for Certain Information Returns.**
www.irs.gov/Form1099

Form **1098-T**

Cat. No. 25087J

www.irs.gov/Form1098T

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RECIPIENT'S/LENDER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no.				OMB No. 1545-1380	
				Form 1098	
				(Rev. April 2025)	
				For calendar year _____	
		1 Mortgage interest received from payer(s)/borrower(s)		Copy A For Internal Revenue Service Center For filing information, Privacy Act, and Paperwork Reduction Act Notice, see the General Instructions for Certain Information Returns. www.irs.gov/Form1099	
		\$			
RECIPIENT'S/LENDER'S TIN	PAYER'S/BORROWER'S TIN	2 Outstanding mortgage principal	3 Mortgage origination date		
		\$			
		4 Refund of overpaid interest	5 Mortgage insurance premiums		
PAYER'S/BORROWER'S name		\$	\$		
		6 Points paid on purchase of principal residence			
		\$			
Street address (including apt. no.)		7 <input type="checkbox"/> If address of property securing mortgage is the same as PAYER'S/BORROWER'S address, check the box, or enter the address or description in box 8.			
City or town, state or province, country, and ZIP or foreign postal code		8 Address or description of property securing mortgage (see instructions)			
9 Number of properties securing the mortgage	10 Other				
Account number (see instructions)					
				11 Mortgage acquisition date	

Form **1098** (Rev. 4-2025)

Cat. No. 14402K

www.irs.gov/Form1098

Department of the Treasury - Internal Revenue Service

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PAYER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no.		1a Total ordinary dividends		OMB No. 1545-0110	
		\$		Form 1099-DIV	
		1b Qualified dividends		(Rev. January 2024)	
		\$		For calendar year	
		2a Total capital gain distr.		2b Unrecap. Sec. 1250 gain	
		\$		\$	
PAYER'S TIN	RECIPIENT'S TIN	2c Section 1202 gain		2d Collectibles (28%) gain	
		\$		\$	
		2e Section 897 ordinary dividends		2f Section 897 capital gain	
		\$		\$	
RECIPIENT'S name		3 Nondividend distributions		4 Federal income tax withheld	
		\$		\$	
Street address (including apt. no.)		5 Section 199A dividends		6 Investment expenses	
		\$		\$	
City or town, state or province, country, and ZIP or foreign postal code		7 Foreign tax paid		8 Foreign country or U.S. possession	
		\$			
		9 Cash liquidation distributions		10 Noncash liquidation distributions	
		\$		\$	
		11 FATCA filing requirement		12 Exempt-interest dividends	
		<input type="checkbox"/>		\$	
		13 Specified private activity bond interest dividends		\$	
Account number (see instructions)		2nd TIN not.		14 State	
		<input type="checkbox"/>		15 State identification no.	
				16 State tax withheld	
				\$	
				\$	

Dividends and Distributions

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and Paperwork
Reduction Act
Notice, see the
current General
Instructions for
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PAYER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no.		Payer's RTN (optional)		OMB No. 1545-0112	
		1 Interest income \$		Form 1099-INT (Rev. January 2024)	
				For calendar year _____	
PAYER'S TIN		RECIPIENT'S TIN		2 Early withdrawal penalty \$	
				3 Interest on U.S. Savings Bonds and Treasury obligations \$	
RECIPIENT'S name		4 Federal income tax withheld \$		5 Investment expenses \$	
		6 Foreign tax paid \$		7 Foreign country or U.S. territory	
Street address (including apt. no.)		8 Tax-exempt interest \$		9 Specified private activity bond interest \$	
		10 Market discount \$		11 Bond premium \$	
City or town, state or province, country, and ZIP or foreign postal code		FATCA filing requirement <input type="checkbox"/>		12 Bond premium on Treasury obligations \$	
		13 Bond premium on tax-exempt bond \$			
Account number (see instructions)		2nd TIN not. <input type="checkbox"/>	14 Tax-exempt and tax credit bond CUSIP no.	15 State	16 State identification no.
					17 State tax withheld \$

Interest
Income

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22222		VOID <input type="checkbox"/>		a Employee's social security number		For Official Use Only OMB No. 1545-0029					
b Employer identification number (EIN)					1 Wages, tips, other compensation		2 Federal income tax withheld				
c Employer's name, address, and ZIP code					3 Social security wages		4 Social security tax withheld				
					5 Medicare wages and tips		6 Medicare tax withheld				
					7 Social security tips		8 Allocated tips				
d Control number					9		10 Dependent care benefits				
e Employee's first name and initial		Last name		Suff.	11 Nonqualified plans		12a See instructions for box 12				
f Employee's address and ZIP code					13 Statutory employee <input type="checkbox"/> Retirement plan <input type="checkbox"/> Third-party sick pay <input type="checkbox"/>		12b				
					14 Other		12c				
							12d				
15 State	Employer's state ID number		16 State wages, tips, etc.	17 State income tax	18 Local wages, tips, etc.	19 Local income tax	20 Locality name				

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PAYER'S/TRUSTEE'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no.		1 Gross distribution	OMB No. 1545-1760
		\$	Form 1099-Q
		2 Earnings	(Rev. April 2025)
		\$	For calendar year _____
PAYER'S/TRUSTEE'S TIN	RECIPIENT'S TIN	3 Basis	4 Type of transfer:
RECIPIENT'S name		\$	a <input type="checkbox"/> Trustee-to-trustee
		5 Distribution is from:	b <input type="checkbox"/> QTP to Roth IRA
Street address (including apt. no.)		a <input type="checkbox"/> Private QTP	6 Check if the recipient is not the designated beneficiary <input type="checkbox"/>
City or town, state or province, country, and ZIP or foreign postal code		b <input type="checkbox"/> State QTP	
Account number (see instructions)		c <input type="checkbox"/> Coverdell ESA	

**Payments From
Qualified
Education
Programs
(Under Sections
529 and 530)**

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For filing information,
Privacy Act, and
Paperwork Reduction
Act Notice, see the
**General Instructions
for Certain
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Returns.**

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Form **1099-Q** (Rev. 4-2025)

Cat. No. 32223J

www.irs.gov/Form1099Q

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FILER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone number		1 Payments received for qualified tuition and related expenses \$	OMB No. 1545-1574 2025 Form 1098-T
		2	
FILER'S employer identification no.	STUDENT'S TIN <input type="checkbox"/>	3	
STUDENT'S name		4 Adjustments made for a prior year \$	5 Scholarships or grants \$
Street address (including apt. no.)		6 Adjustments to scholarships or grants for a prior year \$	7 Checked if the amount in box 1 includes amounts for an academic period beginning January–March 2026 <input type="checkbox"/>
City or town, state or province, country, and ZIP or foreign postal code			
Service Provider/Acct. No. (see instr.)	8 Checked if at least half-time student <input type="checkbox"/>	9 Checked if a graduate student <input type="checkbox"/>	10 Ins. contract reimb./refund \$

Tuition Statement

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Form **1098-T**

Cat. No. 25087J

www.irs.gov/Form1098T

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☐ VOID☐ CORRECTED**Mortgage
Interest
Statement**

RECIPIENT'S/LENDER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no.				OMB No. 1545-1380	
				Form 1098	
				(Rev. April 2025)	
				For calendar year _____	
		1 Mortgage interest received from payer(s)/borrower(s)		Copy A For Internal Revenue Service Center For filing information, Privacy Act, and Paperwork Reduction Act Notice, see the General Instructions for Certain Information Returns. www.irs.gov/Form1099	
		\$			
RECIPIENT'S/LENDER'S TIN	PAYER'S/BORROWER'S TIN	2 Outstanding mortgage principal	3 Mortgage origination date		
		\$			
		4 Refund of overpaid interest	5 Mortgage insurance premiums		
PAYER'S/BORROWER'S name		\$	\$		
		6 Points paid on purchase of principal residence			
		\$			
Street address (including apt. no.)		7 <input type="checkbox"/> If address of property securing mortgage is the same as PAYER'S/BORROWER'S address, check the box, or enter the address or description in box 8.			
City or town, state or province, country, and ZIP or foreign postal code		8 Address or description of property securing mortgage (see instructions)			
9 Number of properties securing the mortgage	10 Other				
Account number (see instructions)					
				11 Mortgage acquisition date	

Form **1098** (Rev. 4-2025)

Cat. No. 14402K

www.irs.gov/Form1098

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PAYER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no.		1a Total ordinary dividends		OMB No. 1545-0110	
		\$		Form 1099-DIV	
		1b Qualified dividends		(Rev. January 2024)	
		\$		For calendar year	
		2a Total capital gain distr.		2b Unrecap. Sec. 1250 gain	
		\$		\$	
PAYER'S TIN	RECIPIENT'S TIN	2c Section 1202 gain		2d Collectibles (28%) gain	
		\$		\$	
		2e Section 897 ordinary dividends		2f Section 897 capital gain	
		\$		\$	
RECIPIENT'S name		3 Nondividend distributions		4 Federal income tax withheld	
		\$		\$	
Street address (including apt. no.)		5 Section 199A dividends		6 Investment expenses	
		\$		\$	
City or town, state or province, country, and ZIP or foreign postal code		7 Foreign tax paid		8 Foreign country or U.S. possession	
		\$			
		9 Cash liquidation distributions		10 Noncash liquidation distributions	
		\$		\$	
		11 FATCA filing requirement		12 Exempt-interest dividends	
		<input type="checkbox"/>		\$	
		13 Specified private activity bond interest dividends		\$	
Account number (see instructions)		2nd TIN not.		14 State	
		<input type="checkbox"/>		15 State identification no.	
				16 State tax withheld	
				\$	
				\$	

Dividends and Distributions

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and Paperwork
Reduction Act
Notice, see the
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Instructions for
Certain
Information
Returns.