FINANCIAL™
DATA EXCHANGE

Tax Document QR Code Specification

Version 2024.0
June 2024

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Revision History

Document Version	Notes	Date
2024.0	Updated legal notice, general updates and corrections.	**June 2024**
2023.0	Updates for using QR Code to transmit Basic Auth credentials.	**December 2023**
2020.0	Initial Document Release Includes example tax documents for tax year 2020 from RFC 0118.	**May 2021**

Contents

Introduction

One of the goals of the Financial Data Exchange organization is to define standards and encourage practices that improve the experience of consumers in the management of their financial data. Each year consumers must manage the receipt of annual tax documents and use the data in those documents in the preparation of income tax returns.

This document defines a simple mechanism to support taxpayers' tax data management based on the commonly used barcode standard of QR codes.

Taxpayer benefits

Taxpayer benefits include:

- Eliminating data entry errors in the income tax return preparation process
- Reducing time spent in tax preparation
- Using either paper or digital (PDF) forms

Tax and financial industry benefits

Tax and financial industry benefits include:

- Reduced programming costs of simpler systems
- Eliminating the use of Optical Character Recognition (OCR) technology
- Increased success rate of tax document scanning versus OCR
- A simpler mechanism for tax document issuers to integrate with tax software:
    - Taxpayer consent is implicit through their action, no need to capture and store their credentials or consents
    - Technology connections to industry partners not needed
    - Full-fledged API services consuming or providing data also not needed

Audience

This document defines a simple mechanism which the tax industry can use to support taxpayers' tax data management. The intended audiences are:

- Tax Document Issuers: Organizations which have IRS-mandated requirements to deliver tax documents to taxpayers, or offer other financial information statements for taxpayer convenience
- Tax Software Companies: Builders of applications which use data from tax documents or informational statements to prepare tax returns

The IRS hosts information on the various tax information forms which must be sent to taxpayers at https://www.irs.gov/instructions/i1099gi.

Tax Document Issuers

Examples of organizations and some of the tax documents which they issue:

- Banks – 1099-INT, 1099-DIV, 1099-OID, 1099-B
- Lenders – 1098, 1098-E, 1099-A, 1099-C
- Brokerage houses – 1099-INT, 1099-DIV, 1099-OID, 1099-B, 1097-BTC
- Insurance companies – 1095-A, 1095-B, 1095-C
- Corporations – 2439, 3921, 3922, 1099-DIV, 1099-MISC, 1099-NEC
- Employers – W-2's, 1099-MISC, 1099-NEC
- Government agencies – 1099-G, 1099-Q
- Payroll providers – W-2's
- Universities – 1098-T
- Partnerships – 1065 K-1
- Escrow companies – 1099-S
- Trusts – 1041 K-1
- Cooperatives – 1099-PATR
- Payment card providers – 1099-K
- Pension plans – 1099-R
- IRA trustees – 1099-R, 5498

Tax Informational Statements

The FDX U.S. Tax specification and QR Codes also provide support for informational statements of income and expense for these additional activities:

- Farms – Farm Income Statement (for IRS Schedule F), Farm Rental Statement (for IRS Form 4835)
- Real Estate management companies – Rental Income Statement (for IRS Schedule E)
- Oil & Gas industry – Royalty Income Statement (for IRS Schedule E)
- Small Businesses – Business Income Statement (for IRS Schedule C)

Sharing Tax Data through QR Codes

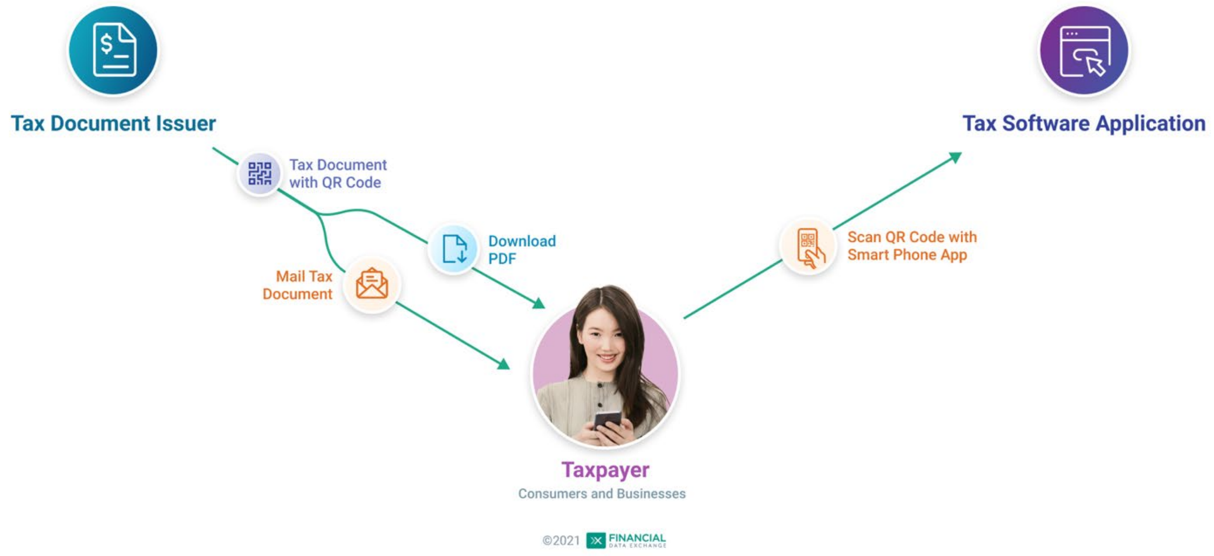
The QR codes standard for two-dimensional bar codes defines how to store information as a series of pixels in a square-shaped grid. This information can be quickly retrieved using computer devices such as smart phones. This specification outlines:

- How issuers of annual tax documents can encode document data in FDX JSON format as QR codes
- How tax software and smart phone applications can retrieve that data and submit it for inclusion in income tax returns of individuals and small businesses.

For more information on QR Codes, see https://en.wikipedia.org/wiki/QR_code.

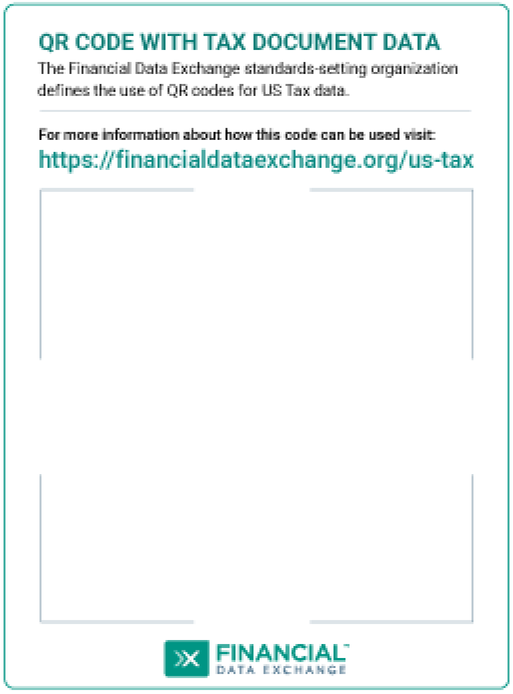
QR Code Workflow

This diagram illustrates the workflow.



FDX QR Code Framing Image

Financial Data Exchange has designed these images to frame any tax data QR codes. They will provide the information taxpayers need to understand why their tax form now has a QR code and where they can go to get additional information. The images provide a 3" area which leaves a quarter-inch whitespace border around QR codes up to 2-1/2" square (the maximum size defined for QR codes). But they can be scaled down for smaller size QR codes as long as a quarter-inch whitespace border remains. They are available at the displayed URL (https://financialdataexchange.org/us-tax) in bitmap .png, vector graphic .ai and .pdf file formats to support your technology choice. They are provided in both horizontal and vertical layouts as shown here, for better fit on various tax forms.



Document Issuer Implementation Steps

Adding QR codes to annual tax documents or informational statements involves the following steps:

1. Download one of the FDX QR code framing images from https://financialdataexchange.org/us-tax
2. Collect the document data and convert it to a Financial Data Exchange (FDX) JSON instance of TaxDataForQR entity
3. Convert the TaxDataForQR instance into a QR code image using standard software libraries (see Appendix 1: Sample Code for Java Developers)
4. Merge the QR code into the FDX framing image
5. Place the combined image in an available location on the tax document or statement
    - If a given IRS form fills an entire page, then its QR code might require using space on a cover page or addendum, for examples see Appendix 2: Example Tax Documents

The full FDX specifications and JSON schemas, including this document, are available from FinancialDataExchange.org. FDX content is free to non-member organizations by registering at https://financialdataexchange.org/FDX/Membership/API-Access-Only/FDX/Membership/Join-FDX.aspx.

Tax Software Implementation

Importing and using the tax data from a taxpayer's QR codes has these steps:

1. Taxpayer signs into or downloads a tax software application
2. Tax software application identifies the taxpayer's device
3. Scanning feature of the tax software application scans for a QR code
    a. If application detects a Basic Auth id and passcode in the QR code as described below in *Using QR Code for Basic Auth APIs*.
    b. Then application uses id and passcode to retrieve the tax data from the tax form provider's API servers.
4. Application imports the scanned tax data securely to the taxpayer's income tax return

There is considerable additional educational information, detail and examples available at https://www.taxdataexchange.org/.

Example for IRS Form 1098, Mortgage Interest Statement

Here is an example (with mock data) of a Form 1098 that could be delivered to a taxpayer, either printed or as a PDF, showing how its QR code could appear in whitespace near the mailing label. Many more such examples are included in Appendix 2: Example Tax Documents.

☐ CORRECTED (if checked)

RECIPIENT'S/LENDER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no.

Financial Intelligence Associates
12022 Sundown Valley Dr
Suite 230
Reston, VA 20191
888-555-1212

*Caution: The amount shown may not be fully deductible by you. Limits based on the loan amount and the cost and value of the secured property may apply. Also, you may only deduct interest to the extent it was incurred by you, actually paid by you, and not reimbursed by another person.

OMB No. 1545-1380
Form **1098**
(Rev. January 2022)
For calendar year 20 23

Mortgage Interest Statement

1 Mortgage interest received from payer(s)/borrower(s)* $ 1008.00

RECIPIENT'S/LENDER'S TIN: 12-3456789

PAYER'S/BORROWER'S TIN: xxx-xx-1234

Sample

2 Outstanding mortgage principal $ 200900.00

3 Mortgage origination date 03/10/2022

4 Refund of overpaid interest $ 4011.00

5 Mortgage insurance premiums $ 5012.00

PAYER'S/BORROWER'S name

Kris Q Public

6 Points paid on purchase of principal residence $ 6013.00

Street address (including apt. no.)

1 Main St

7 ☑ If address of property securing mortgage is the same as PAYER'S/BORROWER'S address, the box is checked, or the address or description is entered in box 8.

City or town, state or province, country, and ZIP or foreign postal code

Melrose, NY 12121

8 Address or description of property securing mortgage

9 Number of properties securing the mortgage: 9

10 Other: 10. Property tax: $10,017.00

Account number (see instructions): 111-23456

Copy B
For Payer/ Borrower

The information in boxes 1 through 9 and 11 is important tax information and is being furnished to the IRS. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if the IRS determines that an underpayment of tax results because you overstated a deduction for this mortgage interest or for these points, reported in boxes 1 and 6; or because you didn't report the refund of interest (box 4); or because you claimed a nondeductible item.

11 Mortgage acquisition date: 11/15/2022

Form **1098** (Rev. 1-2022) (Keep for your records) www.irs.gov/Form1098 Department of the Treasury - Internal Revenue Service

QR CODE WITH TAX DOCUMENT DATA

The Financial Data Exchange standards-setting organization defines the use of QR codes for US Tax data.

For more information about how this code can be used visit:
https://financialdataexchange.org/us-tax

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QR code JSON for above IRS Form 1098 using FDX API v6.0


```
{
  "version": "V6.0.0",
  "softwareId": "FdxBankSoftware-2024",
  "tax1098": {
    "taxYear": 2023,
    "taxFormId": "ID-09990111-1098",
    "taxFormDate": "2024-02-15",
    "taxFormType": "Tax1098",
    "issuer": {
      "tin": "12-3456789",
      "partyType": "BUSINESS",
      "businessName": {
        "name1": "Financial Intelligence Associates"
      },
      "address": {
        "line1": "12022 Sundown Valley Dr",
        "line2": "Suite 230",
        "city": "Reston",
        "region": "VA",
        "postalCode": "20191",
        "country": "US"
      },
      "phone": {
        "number": "8885551212"
      }
    },
    "recipient": {
      "tin": "xxx-xx-1234",
      "partyType": "INDIVIDUAL",
      "individualName": {
        "first": "Kris",
        "middle": "Q",
        "last": "Public"
      },
      "address": {
        "line1": "1 Main St",
        "city": "Melrose",
        "region": "NY",
        "postalCode": "12121",
        "country": "US"
```

```
      }
    },
    "mortgagedProperties": 9,
    "otherInformation": "10. Property tax: $10,017.00",
    "accountNumber": "111-23456",
    "mortgageInterest": 1008.0,
    "outstandingPrincipal": 200900.0,
    "originationDate": "2022-03-10",
    "overpaidRefund": 4011.0,
    "mortgageInsurance": 5012.0,
    "pointsPaid": 6013.0,
    "isPropertyAddressSameAsBorrowerAddress": true,
    "acquisitionDate": "2022-11-15",
    "propertyTax": 10017.0
  }
}
```

Using QR Code for Basic Auth APIs

When creating the recipient's copy of a tax form, the QR code can also be used to deliver the Document ID and Document Passcode used to retrieve full document data via a Basic Auth API. This mechanism would be needed to communicate tax forms whose data is too voluminous to fit in a QR code. For full details, see the Tax Document Alternate Authentication document included in the FDX API.

For a Basic Auth QR Code, generate JSON for the `BasicAuthForQR` entity containing the basic auth credentials as seen here:

```
{
  "basicAuth" : {
    "taxYear" : 2023,
    "taxFormType" : "Tax1099B",
    "id" : "00677560089990B1",
    "passcode" : "PK2Z-0QP-L6EF"
  },
  "version" : "V5.0",
  "softwareId" : "OakTreeSecurities"
}
```

This JSON is then encoded as a QR code and placed on a page of the recipient's copy of the tax document. The following is a horizontal example where the Tax Reporting Entity has added their own descriptive text above the image framing the QR code.

Oak Tree Securities
implements electronic tax data import technologies defined by
the Financial Data Exchange (FDX) organization.

You may scan the below QR code
with your tax software smartphone app that supports this technology.

Using the encoded information,
your tax software will securely retrieve your data from our server
and import the data into your tax return.

Appendix 1: Sample Code for Java Developers

Steps to add QR codes to your tax documents

1. Collect the data for the tax document from your database or file system
2. Create an instance of the Financial Data Exchange schema's TaxDataForQR class
3. Serialize the object to JSON
4. Convert the JSON string to a QR code image
5. Place the image in available space on your tax document or accompanying page

Step 2, Create an instance of FDX TaxDataForQR class

Example code in Java:

```
TaxDataForQR taxData = new TaxDataForQR( );
taxData.setVersion ( FdxVersion.V6_0_0 ); // Version enum of FDX API
specification
taxData.setSoftwareId( "com.your-company" ); // Reverse domain name notation
TaxW2 form = new TaxW2( );
// See FDX API and data structures documentation for properties of the tax form
// Populate the form data
taxData.setTaxW2( form );
```

Step 3, Serialize the object to JSON

You may use the Jackson library available as a Maven dependency. Add the below to your project pom.xml file.

```
<properties>
    <jackson.version>2.11.3</jackson.version>
</properties>

<dependency>
    <groupId>com.fasterxml.jackson.core</groupId>
    <artifactId>jackson-core</artifactId>
    <version>${jackson.version}</version>
</dependency>
```

Add a function to convert the object to a JSON string.

```
public static String convert(
    TaxDataForQR taxDataForQR
) {

 String json = "";

 try {

     StringWriter sw = new StringWriter( );

     ObjectMapper objectMapper = new ObjectMapper( );

     // Indentation recommended but not required
     objectMapper.configure( SerializationFeature.INDENT_OUTPUT, true );

     // Do not include null values
     objectMapper.setSerializationInclusion( JsonInclude.Include.NON_NULL );

     objectMapper.writeValue( sw, taxDataForQR );

     json = sw.toString( );

 } catch ( JsonGenerationException e ) {
     LOGGER.severe( e.getMessage( ) );
 } catch ( JsonMappingException e ) {
     LOGGER.severe( e.getMessage( ) );
 } catch ( IOException e ) {
     LOGGER.severe( e.getMessage( ) );
 }

 return json;

}
```

Step 4, Convert the JSON string to a QR code image

The ZXing ("Zebra Crossing") barcode scanning library for Java is an open-source project at https://github.com/zxing/zxing and provides QR code generation functionality. Maven users can obtain the library by adding the below dependency to your project pom.xml file.

```
<properties>
    <zxing.version>3.4.1</zxing.version>
</properties>
<dependency>
    <groupId>com.google.zxing</groupId>
    <artifactId>core</artifactId>
    <version>${zxing.version}</version>
</dependency>
```

The library will create an image and place it into an output stream that you supply:

```
ByteArrayOutputStream outputStream = new ByteArrayOutputStream( );
```

You specify the image format wanted. Here we assume PNG format.

```
String format = "png"; // or "jpg", if preferred
```

You then specify the preferred image size. The library will not return an image smaller than is necessary to hold the data to be encoded. Therefore, if you set the preferred width and height to 1 pixel, the minimum size image necessary to encode the json string will be generated

```
int preferredWidth = 1;
int preferredHeight = 1;
```

Set the desired error correction level. It is our experience that a level of LOW is sufficient for this purpose. You do this by creating a “Hint” Map as seen here:

```
Map<EncodeHintType, Object> hintMap = new HashMap<>( );
hintMap.put(
    EncodeHintType.ERROR_CORRECTION,
    ErrorCorrectionLevel.L
);
```

Instantiate a QRCodeWriter object.

```
QRCodeWriter qrCodeWriter = new QRCodeWriter( );
```

The object’s encode method will create an object of type BitMatrix.

Important Note: If the json string is too large to fit in a QR code, an error will be thrown.

```
BitMatrix bitMatrix = qrCodeWriter.encode(
    json,
    BarcodeFormat.QR_CODE,
    preferredWidth,
    preferredHeight,
    hintMap
);
```

The library’s MatrixToImageWriter class has a writeToStream static method that will populate your output stream with the qr code image data.

```
MatrixToImageWriter.writeToStream(
    bitMatrix,
    format,
    outputStream
);
```

Your output stream may be converted to a byte array.

```
byte[] imgData = outputStream.toByteArray( );
```

You then place the image on your form in the location you specify.

Important Note

Do not scale down the QR Code when adding to the printed or PDF document.

Doing so will remove pixels from the image and make it impossible to scan.

Appendix 2: Example Tax Documents

These form images are from PDF files provided on the IRS web site. Your company might use approved facsimiles.

The examples assume the document will be folded in half and placed in a window envelope.

The QR code is placed in available whitespace which will not be visible through the envelope window.

(QR code visibility will not be an issue for tax documents delivered as PDF images, of course.)

Form 1097-BTC, Bond Tax Credit

☐ CORRECTED (if checked)

FORM 1097-BTC ISSUER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no.

Financial Intelligence Associates
12022 Sundown Valley Dr
Suite 230
Reston, VA 20191
888-555-1212

FORM 1097-BTC ISSUER'S TIN **12-3456789**	RECIPIENT'S TIN **xxx-xx-1234**

RECIPIENT'S name
Kris Q Public

Street address (including apt. no.)
1 Main St

City or town, state or province, country, and ZIP or foreign postal code
Melrose, NY 12121

Form 1097-BTC issuer is:

☑ Issuer of bond or its agent filing current year Form 1097-BTC for credit being reported

☑ An entity or a person that received or should have received a current year Form 1097-BTC and is distributing part or all of that credit to others

1 Total $ **1007.00**	OMB No. 1545-2197 Form **1097-BTC** (Rev. December 2019)
2a Code **123-456-789**	For calendar year 20 **22**
2b Unique identifier **guid-54321**	
3 Bond type **BondType**	4
5a January $ **511.00**	5b February $ **496.00**
5c March $	5d April $
5e May $	5f June $
5g July $	5h August $
5i September $	5j October $
5k November $	5l December $
6 Comments **6. Comments**	

Bond Tax Credit

Copy B For Recipient

This is important tax information and is being furnished to the IRS. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if an amount of tax credit exceeding the amount reported on this form is claimed on your income tax return.

Form **1097-BTC** (Rev. 12-2019) (keep for your records) www.irs.gov/Form1097BTC Department of the Treasury - Internal Revenue Service

QR CODE WITH TAX DOCUMENT DATA

The Financial Data Exchange standards-setting organization defines the use of QR codes for US Tax data.

For more information about how this code can be used visit:
https://financialdataexchange.org/us-tax

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Form 1098, Mortgage Interest Statement

☐ CORRECTED (if checked)

RECIPIENT'S/LENDER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no. **Financial Intelligence Associates** **12022 Sundown Valley Dr** **Suite 230** **Reston, VA 20191** **888-555-1212**	***Caution:** The amount shown may not be fully deductible by you. Limits based on the loan amount and the cost and value of the secured property may apply. Also, you may only deduct interest to the extent it was incurred by you, actually paid by you, and not reimbursed by another person.	OMB No. 1545-1380 Form **1098** (Rev. January 2022) For calendar year 20 22	**Mortgage Interest Statement**
	1 Mortgage interest received from payer(s)/borrower(s)* $ **1008.00**		**Copy B** **For Payer/ Borrower** The information in boxes 1 through 9 and 11 is important tax information and is being furnished to the IRS. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if the IRS determines that an underpayment of tax results because you overstated a deduction for this mortgage interest or for these points, reported in boxes 1 and 6; or because you didn't report the refund of interest (box 4); or because you claimed a nondeductible item.
RECIPIENT'S/LENDER'S TIN **12-3456789** | PAYER'S/BORROWER'S TIN **xxx-xx-1234**	**2** Outstanding mortgage principal $ **200900.00**	**3** Mortgage origination date **03/10/2022**	
PAYER'S/BORROWER'S name **Kris Q Public**	**4** Refund of overpaid interest $ **4011.00**	**5** Mortgage insurance premiums $ **5012.00**	
	6 Points paid on purchase of principal residence $ **6013.00**		
Street address (including apt. no.) **1 Main St**	**7** ☑ If address of property securing mortgage is the same as PAYER'S/BORROWER'S address, the box is checked, or the address or description is entered in box 8.		
City or town, state or province, country, and ZIP or foreign postal code **Melrose, NY 12121**	**8** Address or description of property securing mortgage		
9 Number of properties securing the mortgage **9** | **10** Other **10. Property tax: $10,017.00**			**11** Mortgage acquisition date **11/15/2022**
Account number (see instructions) **111-23456**			

Form **1098** (Rev. 1-2022) (Keep for your records) www.irs.gov/Form1098 Department of the Treasury - Internal Revenue Service

QR CODE WITH TAX DOCUMENT DATA

The Financial Data Exchange standards-setting organization defines the use of QR codes for US Tax data.

For more information about how this code can be used visit:
https://financialdataexchange.org/us-tax

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Form 1098-C, Contributions of Motor Vehicles, Boats, and Airplanes

2022 Tax Information

QR CODE WITH TAX DOCUMENT DATA

The Financial Data Exchange standards-setting organization defines the use of QR codes for US Tax data.

For more information about how this code can be used visit:
https://financialdataexchange.org/us-tax

FINANCIAL DATA EXCHANGE

☐ CORRECTED (if checked)

Attachment Sequence No. **155A**

Contributions of Motor Vehicles, Boats, and Airplanes

OMB No. 1545-1959

Form **1098-C**

(Rev. November 2019)

For calendar year 20 22

DONEE'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no.

Financial Intelligence Associates
12022 Sundown Valley Dr
Suite 230
Reston, VA 20191
888-555-1212

1 Date of contribution: **01/05/2022**

2a Odometer mileage: **2106**

2b Year	**2c** Make	**2d** Model
2007	**Ford**	**Escape**

DONEE'S TIN	DONOR'S TIN	**3** Vehicle or other identification number
12-3456789	**xxx-xx-1234**	**3VIN123456789VIN10**

DONOR'S name: **Kris Q Public**

4a ☑ Donee certifies that vehicle was sold in arm's length transaction to unrelated party

Street address (including apt. no.): **1 Main St**

4b Date of sale: **04/12/2022**

City or town, state or province, country, and ZIP or foreign postal code: **Melrose, NY 12121**

4c Gross proceeds from sale (see instructions): **$** **4313.00**

5a ☑ Donee certifies that vehicle will not be transferred for money, other property, or services before completion of material improvements or significant intervening use

5b ☐ Donee certifies that vehicle is to be transferred to a needy individual for significantly below fair market value in furtherance of donee's charitable purpose

5c Donee certifies the following detailed description of material improvements or significant intervening use and duration of use

5c. 16, Description of improvements

6a Did you provide goods or services in exchange for the vehicle? . . . . ▶ **Yes** ☑ **No** ☐

6b Value of goods and services provided in exchange for the vehicle

$ **6218.00**

6c Describe the goods and services, if any, that were provided. If this box is checked, donee certifies that the goods and services consisted solely of intangible religious benefits . . . . ▶ ☐

6c. 20, Description Of Goods

7 Under the law, the donor may not claim a deduction of more than $500 for this vehicle if this box is checked . . . . . ▶ ☑

Copy B

For Donor

In order to take a deduction of more than $500 for this contribution, you must attach this copy to your federal tax return.

Unless box 5a or 5b is checked, your deduction cannot exceed the amount in box 4c.

Form **1098-C** (Rev. 11-2019) www.irs.gov/Form1098C Department of the Treasury - Internal Revenue Service

Form 1098-E, Student Loan Interest Statement

☐ CORRECTED (if checked)

RECIPIENT'S/LENDER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone number **Financial Intelligence Associates** **12022 Sundown Valley Dr** **Suite 230** **Reston, VA 20191** **888-555-1212**		OMB No. 1545-1576 **2022** Form **1098-E**	**Student Loan Interest Statement**
RECIPIENT'S TIN **12-3456789**	BORROWER'S TIN **xxx-xx-1234**	**1** Student loan interest received by lender $ **1006.00**	**Copy B** **For Borrower**
BORROWER'S name **Kris Q Public** Street address (including apt. no.) **1 Main St** City or town, state or province, country, and ZIP or foreign postal code **Melrose, NY 12121**			This is important tax information and is being furnished to the IRS. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if the IRS determines that an underpayment of tax results because you overstated a deduction for student loan interest.
Account number (see instructions) **111-55555555**		**2** If checked, box 1 does **not** include loan origination fees and/or capitalized interest for loans made before September 1, 2004 . . . . ☑	

Form **1098-E** (keep for your records) www.irs.gov/Form1098E Department of the Treasury - Internal Revenue Service

QR CODE WITH TAX DOCUMENT DATA

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https://financialdataexchange.org/us-tax

FINANCIAL DATA EXCHANGE

Form 1098-MA, Mortgage Assistance Payments

☐ CORRECTED (if checked)

FILER'S name, street address, city, state, ZIP code, and telephone no. Financial Intelligence Associates 12022 Sundown Valley Dr Suite 230 Reston, VA 20191 888-555-1212		OMB No. 1545-2221 Form **1098-MA** (Rev. September 2019) For calendar year 20 22	**Mortgage Assistance Payments**
FILER'S TIN 12-3456789	HOMEOWNER'S TIN xxx-xx-1234	**1.** Total State HFA and homeowner mortgage payments $ 10000.00	**Copy B** **For Homeowner** This is important tax information and is being furnished to the IRS.
HOMEOWNER'S name Kris Q Public		**2.** State HFA mortgage assistance payments $ 2500.00	
Street address (including apt. no.) (optional) 1 Main St		**3.** Homeowner mortgage payments $ 7500.00	
City, state, and ZIP code (optional) Melrose, NY 12121			
Account number (optional) 111-55555555			

Form **1098-MA** (Rev. 9-2019) (keep for your records) www.irs.gov/Form1098MA Department of the Treasury - Internal Revenue Service

QR CODE WITH TAX DOCUMENT DATA

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https://financialdataexchange.org/us-tax

FINANCIAL DATA EXCHANGE

Form 1098-Q, Qualifying Longevity Annuity Contract Information

☐ CORRECTED (if checked)

ISSUER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no. **Financial Intelligence Associates** **12022 Sundown Valley Dr** **Suite 230** **Reston, VA 20191** **888-555-1212**	ISSUER'S TIN **12-3456789** PARTICIPANT'S TIN **xxx-xx-1234**	OMB No. 1545-2234 Form **1098-Q** (Rev. December 2019)	**Qualifying Longevity Annuity Contract Information**
	1a Annuity amount on start date $ **8000.00**	For calendar year 20 **22**	
	1b Annuity start date **07/01/2022**	**2** If checked, start date may be accelerated ☑	**Copy B** **For Participant**
	3 Total premiums $ **35000.00**	**4** FMV of QLAC $ **48000.00**	

Participant	Month	$	dd	Month	$	dd
PARTICIPANT'S name **Kris Q Public**	**5a** January	400.00	10	**5b** February	400.00	10
Street address (including apt. no.) **1 Main St**	**5c** March	400.00	10	**5d** April	400.00	10
	5e May	400.00	10	**5f** June	400.00	10
City or town, state or province, country, and ZIP or foreign postal code **Melrose, NY 12121**	**5g** July	400.00	10	**5h** August	400.00	10
Account number (see instructions): **111-55555555** Plan number: **760-4517**	**5i** September	400.00	10	**5j** October	400.00	10
	5k November	400.00	10	**5l** December	400.00	10
Name of plan: **AAA QLAC Plans 4** Plan sponsor's EIN: **44-12345467**						

This information is being furnished to the IRS.

Form **1098-Q** (Rev. 12-2019) (Keep for your records) www.irs.gov/Form1098Q Department of the Treasury - Internal Revenue Service

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FINANCIAL DATA EXCHANGE

Form 1098-T, Tuition Statement

☐ CORRECTED

FILER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone number **Financial Intelligence Associates** **12022 Sundown Valley Dr** **Reston, VA 20191**		1 Payments received for qualified tuition and related expenses $ **14000.00** 2	OMB No. 1545-1574 **2022** Form **1098-T**
FILER'S employer identification no. **12-3456789**	STUDENT'S TIN **XXX-XX-1234**	3	
STUDENT'S name **Kris Q. Public**		4 Adjustments made for a prior year $ **2000.00**	5 Scholarships or grants $ **3000.00**
Street address (including apt. no.) **1 Main St** City or town, state or province, country, and ZIP or foreign postal code **Melrose, NY 12121**		6 Adjustments to scholarships or grants for a prior year $ **400.00**	7 Checked if the amount in box 1 includes amounts for an academic period beginning January–March 2023 ☑
Service Provider/Acct. No. (see instr.) **123-1234567**	8 Checked if at least half-time student ☑	9 Checked if a graduate student ☑	10 Ins. contract reimb./refund $ **50.00**

Tuition Statement

Copy B
For Student

This is important tax information and is being furnished to the IRS. This form must be used to complete Form 8863 to claim education credits. Give it to the tax preparer or use it to prepare the tax return.

Form **1098-T** (keep for your records) www.irs.gov/Form1098T Department of the Treasury - Internal Revenue Service

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The Financial Data Exchange standards-setting organization defines the use of QR codes for US Tax data.

For more information about how this code can be used visit:
https://financialdataexchange.org/us-tax

FINANCIAL DATA EXCHANGE

Form 1099-A, Acquisition or Abandonment of Secured Property

☐ CORRECTED (if checked)

LENDER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no. **Financial Intelligence Associates** **12022 Sundown Valley Dr** **Suite 230** **Reston, VA 20191** **888-555-1212**		OMB No. 1545-0877 Form **1099-A** (Rev. January 2022) For calendar year 20 22	**Acquisition or Abandonment of Secured Property**
LENDER'S TIN **12-3456789**	BORROWER'S TIN **xxx-xx-1234**	1 Date of lender's acquisition or knowledge of abandonment **04/01/2022**	2 Balance of principal outstanding $ **200000.00**
BORROWER'S name **Kris Q Public**		3	4 Fair market value of property $ **140000.00**
Street address (including apt. no.) **1 Main St**		5 If checked, the borrower was personally liable for repayment of the debt . . . . ▶ ☑	
City or town, state or province, country, and ZIP or foreign postal code **Melrose, NY 12121**		6 Description of property **Unimproved land**	
Account number (see instructions) **111-55555555**			

Copy B
For Borrower

This is important tax information and is being furnished to the IRS. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if taxable income results from this transaction and the IRS determines that it has not been reported.

Form **1099-A** (Rev. 1-2022) (keep for your records) www.irs.gov/Form1099A Department of the Treasury - Internal Revenue Service

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The Financial Data Exchange standards-setting organization defines the use of QR codes for US Tax data.

For more information about how this code can be used visit:
https://financialdataexchange.org/us-tax

FINANCIAL DATA EXCHANGE

Form 1099-B, Proceeds From Broker and Barter Exchange Transactions

☐ CORRECTED (if checked)

PAYER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no. **Financial Intelligence Associates** **12022 Sundown Valley Dr** **Reston, VA 20191**	Applicable checkbox on Form 8949 **A**	OMB No. 1545-0715 2022 Form 1099-B	**Proceeds From Broker and Barter Exchange Transactions**
	1a Description of property (Example: 100 sh. XYZ Co.) **TODO: Create example details for different transactions and adjustmentC**		
	1b Date acquired **Various**	**1c** Date sold or disposed **12/01/2022**	
PAYER'S TIN **12-3456789** / RECIPIENT'S TIN **XXX-XX-1234**	**1d** Proceeds $ **1400.00**	**1e** Cost or other basis $ **1500.00**	**Copy B** **For Recipient**
	1f Accrued market discount $ **0.00**	**1g** Wash sale loss disallowed $ **140.00**	
RECIPIENT'S name **Kris Q. Public**	**2** Short-term gain or loss ☐ Long-term gain or loss ☑ Ordinary ☑	**3** If checked, proceeds from: Collectibles ☐ QOF ☐	This is important tax information and is being furnished to the IRS. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.
Street address (including apt. no.) **1 Main St**	**4** Federal income tax withheld $	**5** If checked, noncovered security ☐	
City or town, state or province, country, and ZIP or foreign postal code **Melrose, NY 12121**	**6** Reported to IRS: Gross proceeds ☐ Net proceeds ☑	**7** If checked, loss is not allowed based on amount in 1d ☑	
Account number (see instructions) **123-1234567**	**8** Profit or (loss) realized in 2022 on closed contracts $	**9** Unrealized profit or (loss) on open contracts—12/31/2021 $	
CUSIP number **037833100** / FATCA filing requirement ☑	**10** Unrealized profit or (loss) on open contracts—12/31/2022 $	**11** Aggregate profit or (loss) on contracts $	
14 State name / **15** State identification no. / **16** State tax withheld $ $	**12** If checked, basis reported to IRS ☑	**13** Bartering $	

Form **1099-B** (Keep for your records) www.irs.gov/Form1099B Department of the Treasury - Internal Revenue Service

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The Financial Data Exchange standards-setting organization defines the use of QR codes for US Tax data.

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FINANCIAL DATA EXCHANGE

Form 1099-C, Cancellation of Debt

☐ CORRECTED (if checked)

CREDITOR'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no. **Financial Intelligence Associates** **12022 Sundown Valley Dr** **Suite 230** **Reston, VA 20191** **888-555-1212**	1 Date of identifiable event **04/01/2022** 2 Amount of debt discharged $ **20000.00** 3 Interest, if included in box 2 $ **300.00**	OMB No. 1545-1424 Form **1099-C** (Rev. January 2022) For calendar year 20 **22**	**Cancellation of Debt**
CREDITOR'S TIN **12-3456789** / DEBTOR'S TIN **xxx-xx-1234**	4 Debt description **Signature loan**		**Copy B** **For Debtor** This is important tax information and is being furnished to the IRS. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if taxable income results from this transaction and the IRS determines that it has not been reported.
DEBTOR'S name **Kris Q Public** Street address (including apt. no.) **1 Main St** City or town, state or province, country, and ZIP or foreign postal code **Melrose, NY 12121**	5 If checked, the debtor was personally liable for repayment of the debt . . . . ☑		
Account number (see instructions) **111-5555555**	6 Identifiable event code **F**	7 Fair market value of property $ **7000.00**	

Form **1099-C** (Rev. 1-2022) (keep for your records) www.irs.gov/Form1099C Department of the Treasury - Internal Revenue Service

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FINANCIAL DATA EXCHANGE

Form 1099-DIV, Dividends and Distributions

☐ CORRECTED (if checked)

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	
Financial Intelligence Associates **12022 Sundown Valley Dr** **Suite 230** **Reston, VA 20191** **888-555-1212**		$ **1107.00**	Form **1099-DIV** (Rev. January 2022)	**Dividends and Distributions**
		1b Qualified dividends $ **1208.00**	For calendar year 20 **21**	
		2a Total capital gain distr. $ **2109.00**	2b Unrecap. Sec. 1250 gain $ **2210.00**	**Copy B** **For Recipient**
PAYER'S TIN **12-3456789**	RECIPIENT'S TIN **xxx-xx-1234**	2c Section 1202 gain $ **2311.00**	2d Collectibles (28%) gain $ **2412.00**	
		2e Section 897 ordinary dividends $ **2512.40**	2f Section 897 capital gain $ **2612.80**	
RECIPIENT'S name **Kris Q Public**		3 Nondividend distributions $ **3013.00**	4 Federal income tax withheld $ **4014.00**	This is important tax information and is being furnished to the IRS. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.
Street address (including apt. no.) **1 Main St**		5 Section 199A dividends $ **5015.00**	6 Investment expenses $ **6016.00**	
		7 Foreign tax paid $ **7017.00**	8 Foreign country or U.S. possession **Mexico**	
City or town, state or province, country, and ZIP or foreign postal code **Melrose, NY 12121**		9 Cash liquidation distributions $ **9019.00**	10 Noncash liquidation distributions $ **10020.00**	
	11 FATCA filing requirement ☐	12 Exempt-interest dividends $ **11021.00**	13 Specified private activity bond interest dividends $ **12022.00**	
Account number (see instructions) **111-5555555**		14 State **NY** / 15 State identification no. **14-000023**	16 State tax withheld $ **15023.00** $	

Form **1099-DIV** (Rev. 1-2022) (keep for your records) www.irs.gov/Form1099DIV Department of the Treasury - Internal Revenue Service

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FINANCIAL DATA EXCHANGE

Form 1099-G, Certain Government Payments

☐ CORRECTED (if checked)

PAYER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no. **Financial Intelligence Associates** **12022 Sundown Valley Dr** **Reston, VA 20191**		**1** Unemployment compensation $ **1000.00** **2** State or local income tax refunds, credits, or offsets $ **2000.00**	OMB No. 1545-0120 Form **1099-G** (Rev. January 2022) For calendar year 20 22	**Certain Government Payments**
PAYER'S TIN **12-3456789**	RECIPIENT'S TIN **XXX-XX-1234**	**3** Box 2 amount is for tax year **2019**	**4 Federal income tax withheld** $ **400.00**	**Copy B** **For Recipient**
RECIPIENT'S name **Kris Q. Public** Street address (including apt. no.) **1 Main St** City or town, state or province, country, and ZIP or foreign postal code **Melrose, NY 12121**		**5** RTAA payments $ **500.00** **7** Agriculture payments $ **700.00** **9** Market gain $ **900.00**	**6** Taxable grants $ **600.00** **8** If checked, box 2 is trade or business income ▶ ☑	This is important tax information and is being furnished to the IRS. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.
Account number (see instructions) **123-1234567**		**10a** State: **CA** **10b** State identification no.: **123-12345**	**11** State income tax withheld $ **110.00** $	

Form **1099-G** (Rev. 1-2022) (keep for your records) www.irs.gov/Form1099G Department of the Treasury - Internal Revenue Service

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FINANCIAL DATA EXCHANGE

Form 1099-H, Health Coverage Tax Credit (HCTC) Advance Payments

☐ CORRECTED (if checked)

ISSUER'S/PROVIDER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no. **Financial Intelligence Associates** **12022 Sundown Valley Dr** **Suite 230** **Reston, VA 20191**		1 Amount of HCTC advance payments $ **3100.00** 2 No. of mos. of HCTC advance payments and reimbursement credits paid to you **12**	OMB No. 1545-1813 Form **1099-H** (Rev. December 2020) For calendar year 20 **22**	**Health Coverage Tax Credit (HCTC) Advance Payments**
ISSUER'S/PROVIDER'S TIN **12-3456789**	RECIPIENT'S TIN **xxx-xx-1234**	3 Jan. $ **100.00**	9 July $ **700.00**	
RECIPIENT'S name **Kris Q Public**		4 Feb. $ **200.00**	10 Aug. $ **800.00**	**Copy B** **For Recipient**
		5 Mar. $ **300.00**	11 Sept. $ **900.00**	This is important tax information and is being furnished to the IRS.
Street address (including apt. no.) **1 Main St**		6 Apr. $ **400.00**	12 Oct. $ **1000.00**	
City or town, state or province, country, and ZIP or foreign postal code **Melrose, NY 12121**		7 May $ **500.00**	13 Nov. $ **1100.00**	
		8 June $ **600.00**	14 Dec. $ **1200.00**	

Form **1099-H** (Rev. 12-2020) (keep for your records) www.irs.gov/Form1099H Department of the Treasury - Internal Revenue Service

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FINANCIAL DATA EXCHANGE

Form 1099-INT, Interest Income

☐ CORRECTED (if checked)

PAYER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no. **Financial Intelligence Associates** **12022 Sundown Valley Dr** **Suite 230** **Reston, VA 20191** **888-555-1212**	Payer's RTN (optional) **007007007** **1** Interest income $ **1008.00**	OMB No. 1545-0112 Form **1099-INT** (Rev. January 2022) For calendar year 20 22	**Interest Income**
PAYER'S TIN **12-3456789** / RECIPIENT'S TIN **xxx-xx-1234**	**2** Early withdrawal penalty $ **2009.00**		**Copy B** **For Recipient**
	3 Interest on U.S. Savings Bonds and Treasury obligations $ **3010.00**		
RECIPIENT'S name **Kris Q Public**	**4 Federal income tax withheld** $ **4011.00**	**5** Investment expenses $ **5012.00**	This is important tax information and is being furnished to the IRS. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.
Street address (including apt. no.) **1 Main St**	**6** Foreign tax paid $ **6013.00**	**7** Foreign country or U.S. possession **Canada**	
City or town, state or province, country, and ZIP or foreign postal code **Melrose, NY 12121**	**8** Tax-exempt interest $ **8015.00**	**9** Specified private activity bond interest $ **9016.00**	
FATCA filing requirement ☐	**10** Market discount $ **10017.00**	**11** Bond premium $ **11018.00**	
	12 Bond premium on Treasury obligations $ **12019.00**	**13** Bond premium on tax-exempt bond $ **13020.00**	
Account number (see instructions) **111-5555555**	**14** Tax-exempt and tax credit bond CUSIP no. **CUSIP**	**15** State **NY** / **16** State identification no. **15-000022**	**17** State tax withheld $ **17022.00** $

Form **1099-INT** (Rev. 1-2022) (keep for your records) www.irs.gov/Form1099INT Department of the Treasury - Internal Revenue Service

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FINANCIAL DATA EXCHANGE

Form 1099-K, Merchant Card and Third-Party Network Payments

☐ CORRECTED (if checked)

FILER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no. **Financial Intelligence Associates 12022 Sundown Valley Dr Suite 230 Reston, VA 20191 888-555-1212**	FILER'S TIN **12-3456789** PAYEE'S TIN **xxx-xx-0123** **1a** Gross amount of payment card/third party network transactions $ **6000.00**	OMB No. 1545-2205 Form **1099-K** (Rev. January 2022) For calendar year 20 **22**	**Payment Card and Third Party Network Transactions**
Check to indicate if FILER is a (an): Payment settlement entity (PSE) ☑ Electronic Payment Facilitator (EPF)/Other third party ☑ Check to indicate transactions reported are: Payment card ☑ Third party network ☑	**1b** Card Not Present transactions $ **2000.00** **3** Number of payment transactions **356.00**	**2** Merchant category code **1731** **4 Federal income tax withheld** $ **400.00**	**Copy B** **For Payee** This is important tax information and is being furnished to the IRS. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if taxable income results from this transaction and the IRS determines that it has not been reported.
PAYEE'S name **Kris Q Public**	**5a** January $ **100.00**	**5b** February $ **200.00**	
Street address (including apt. no.) **1 Main St**	**5c** March $ **300.00**	**5d** April $ **400.00**	
	5e May $ **500.00**	**5f** June $ **600.00**	
City or town, state or province, country, and ZIP or foreign postal code **Melrose, NY 12121**	**5g** July $ **700.00**	**5h** August $ **800.00**	
PSE'S name and telephone number **PSE Associates 777-123-4567 x. 111**	**5i** September $ **900.00**	**5j** October $ **1000.00**	
	5k November $ **1100.00**	**5l** December $ **1200.00**	
Account number (see instructions) **111-5555555**	**6** State **NY**	**7** State identification no. **123-1234**	**8** State income tax withheld $ **10.00** $

Form **1099-K** (Rev. 1-2022) (Keep for your records) www.irs.gov/Form1099K Department of the Treasury - Internal Revenue Service

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https://financialdataexchange.org/us-tax

FINANCIAL DATA EXCHANGE

Form 1099-LS, Reportable Life Insurance Sale

☐ CORRECTED (if checked)

ACQUIRER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no. **Financial Intelligence Associates** **12022 Sundown Valley Dr** **Suite 230** **Reston, VA 20191** **888-555-1212**	**1** Amount paid to payment recipient $ **1200.00** **2** Date of sale **07/01/2022**	OMB No. 1545-2281 Form **1099-LS** (Rev. December 2019) For calendar year 20 **22**

Reportable Life Insurance Sale

ACQUIRER'S TIN **12-3456789**	PAYMENT RECIPIENT'S TIN **xxx-xx-1234**	Issuer's name **R I Associates**
PAYMENT RECIPIENT'S name **Kris Q Public** Street address (including apt. no.) **1 Main St** City or town, state or province, country, and ZIP or foreign postal code **Melrose, NY 12121**		Acquirer's information contact name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no. (if different from ACQUIRER) **J Q Public** **1 Main St** **Melrose, NY 12121**
Policy number **string**		

Copy B

For Payment Recipient

This is important tax information and is being furnished to the IRS. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this item is required to be reported and the IRS determines that it has not been reported.

Form **1099-LS** (Rev. 12-2019) (keep for your records) www.irs.gov/Form1099LS Department of the Treasury - Internal Revenue Service

QR CODE WITH TAX DOCUMENT DATA

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https://financialdataexchange.org/us-tax

FINANCIAL DATA EXCHANGE

Form 1099-LTC, Long-Term Care and Accelerated Death Benefits

☐ CORRECTED (if checked)

PAYER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no. **Financial Intelligence Associates** **12022 Sundown Valley Dr** **Suite 230** **Reston, VA 20191** **888-555-1212**	1 Gross long-term care benefits paid $ **1000.00**	OMB No. 1545-1519 Form **1099-LTC** (Rev. October 2019)	**Long-Term Care and Accelerated Death Benefits**
	2 Accelerated death benefits paid $ **2000.00**	For calendar year 20 **22**	
PAYER'S TIN **12-3456789**	POLICYHOLDER'S TIN **xxx-xx-1234**	3 ☑ Per diem ☑ Reimbursed amount	INSURED'S TIN **555-55-5555**
POLICYHOLDER'S name **Kris Q Public** Street address (including apt. no.) **1 Main St** City or town, state or province, country, and ZIP or foreign postal code **Melrose, NY 12121**	INSURED'S name **Taylor Public** Street address (including apt. no.) **1 Main St** City or town, state or province, country, and ZIP or foreign postal code **Melrose, NY 12121**	**Copy B** **For Policyholder** This is important tax information and is being furnished to the IRS. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this item is required to be reported and the IRS determines that it has not been reported.	
Account number (see instructions) **111-55555555**	4 Qualified contract (optional) ☑	5 (optional) ☑ Chronically ill ☐ Terminally ill	Date certified **04/01/2022**

Form **1099-LTC** (Rev. 10-2019) (keep for your records) www.irs.gov/Form1099LTC Department of the Treasury - Internal Revenue Service

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FINANCIAL DATA EXCHANGE

Form 1099-MISC, Miscellaneous Income

☐ CORRECTED (if checked)

PAYER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no. **Financial Intelligence Associates** **12022 Sundown Valley Dr** **Suite 230** **Reston, VA 20191** **888-555-1212**	1 Rents $ **1007.00** 2 Royalties $ **2008.00** 3 Other income $ **3009.00**	OMB No. 1545-0115 Form **1099-MISC** (Rev. January 2022) For calendar year 20 **21** **4 Federal income tax withheld** **$ 4010.00**	**Miscellaneous Information** **Copy B** **For Recipient**
PAYER'S TIN **12-3456789** / RECIPIENT'S TIN **xxx-xx-1234**	5 Fishing boat proceeds $ **5011.00**	6 Medical and health care payments $ **6012.00**	
RECIPIENT'S name **Kris Q Public**	7 Payer made direct sales totaling $5,000 or more of consumer products to recipient for resale ☑	8 Substitute payments in lieu of dividends or interest $ **8015.00**	This is important tax information and is being furnished to the IRS. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.
Street address (including apt. no.) **1 Main St**	9 Crop insurance proceeds $ **9016.00**	10 Gross proceeds paid to an attorney $ **10017.00**	
City or town, state or province, country, and ZIP or foreign postal code **Melrose, NY 12121**	11 Fish purchased for resale $	12 Section 409A deferrals $ **12018.00**	
13 FATCA filing requirement ☐	14 Excess golden parachute payments $ **13020.00**	15 Nonqualified deferred compensation $ **14021.00**	
Account number (see instructions) **111-5555555**	16 State tax withheld $ **15022.00** $	17 State/Payer's state no. **NY/xxx-16022**	18 State income $ **17022.00** $

Form **1099-MISC** (Rev. 1-2022) (keep for your records) www.irs.gov/Form1099MISC Department of the Treasury - Internal Revenue Service

QR CODE WITH TAX DOCUMENT DATA

The Financial Data Exchange standards-setting organization defines the use of QR codes for US Tax data.

For more information about how this code can be used visit:
https://financialdataexchange.org/us-tax

FINANCIAL DATA EXCHANGE

Form 1099-NEC, Nonemployee Compensation

☐ CORRECTED (if checked)

PAYER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no. **Financial Intelligence Associates** **12022 Sundown Valley Dr** **Suite 230** **Reston, VA 20191** **888-555-1212**		OMB No. 1545-0116 Form **1099-NEC** (Rev. January 2022) For calendar year 20 **21**	**Nonemployee Compensation**
PAYER'S TIN **12-3456789**	RECIPIENT'S TIN **xxx-xx-1234**	**1** Nonemployee compensation $ **1008.00**	**Copy B** **For Recipient** This is important tax information and is being furnished to the IRS. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.
RECIPIENT'S name **Kris Q Public**		**2** Payer made direct sales totaling $5,000 or more of consumer products to recipient for resale ☐	
Street address (including apt. no.) **1 Main St**		**3**	
City or town, state or province, country, and ZIP or foreign postal code **Melrose, NY 12121**		**4 Federal income tax withheld** $ **4009.00**	
Account number (see instructions) **111-5555555**		**5** State tax withheld $ **5010.00** $	**6** State/Payer's state no. **/xxx-123456**
		7 State income $ **7010.00** $	

Form **1099-NEC** (Rev. 1-2022) (keep for your records) www.irs.gov/Form1099NEC Department of the Treasury - Internal Revenue Service

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FINANCIAL DATA EXCHANGE

Form 1099-OID, Original Issue Discount

CORRECTED (if checked)

PAYER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no.

Financial Intelligence Associates
12022 Sundown Valley Dr
Suite 230
Reston, VA 20191
888-555-1212

1 Original issue discount for the year*
$ **1007.00**

* This may not be the correct figure to report on your income tax return. See instructions on the back.

2 Other periodic interest
$ **2008.00**

OMB No. 1545-0117

Form **1099-OID**

(Rev. October 2019)

For calendar year 20 22

Original Issue Discount

PAYER'S TIN	RECIPIENT'S TIN
12-3456789	**xxx-xx-1234**

3 Early withdrawal penalty
$ **3009.00**

4 Federal income tax withheld
$ **4010.00**

Copy B

For Recipient

5 Market discount
$ **5011.00**

6 Acquisition premium
$ **6012.00**

RECIPIENT'S name

Kris Q Public

Street address (including apt. no.)

1 Main St

City or town, state or province, country, and ZIP or foreign postal code

Melrose, NY 12121

7 Description

7. 13, OID description

8 Original issue discount on U.S. Treasury obligations*
$ **8014.00**

9 Investment expenses
$ **9015.00**

FATCA filing requirement ☐

10 Bond premium
$ **10016.00**

11 Tax-exempt OID
$ **11017.00**

Account number (see instructions)

111-5555555

12 State	13 State identification no.	14 State tax withheld
NY	**12-000018**	$ **14018.00**
		$

This is important tax information and is being furnished to the IRS. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.

Form **1099-OID** (Rev. 10-2019) (keep for your records) www.irs.gov/Form1099OID Department of the Treasury - Internal Revenue Service

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FINANCIAL DATA EXCHANGE

Form 1099-PATR, Taxable Distributions Received From Cooperatives

☐ CORRECTED (if checked)

PAYER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no. **Financial Intelligence Associates** **12022 Sundown Valley Dr** **Suite 230** **Reston, VA 20191** **888-555-1212**	**1** Patronage dividends $ **10000.00** **2** Nonpatronage distributions $ **2000.00** **3** Per-unit retain allocations $ **3000.00**	OMB No. 1545-0118 **2022** Form **1099-PATR**	**Taxable Distributions Received From Cooperatives**
PAYER'S TIN **12-3456789** / RECIPIENT'S TIN **xxx-xx-1234**	**4 Federal income tax withheld** $ **400.00**	**5** Redeemed nonqualified notices $ **500.00**	**Copy B** **For Recipient**
RECIPIENT'S name **Kris Q Public**	**6** Section 199A(g) deduction $	**7** Qualified payments (Section 199A(b)(7)) $ **700.00**	This is important tax information and is being furnished to the IRS. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.
Street address (including apt. no.) **1 Main St**	**8** Section 199A(a) qual. items $	**9** Section 199A(a) SSTB items $	
City or town, state or province, country, and ZIP or foreign postal code **Melrose, NY 12121**	**10** Investment credit $ **800.00**	**11** Work opportunity credit $ **900.00**	
Account number (see instructions) **111-5555555**	**12** Other credits and deductions $ **110.00**	**13** Specified Coop ☐	

Form **1099-PATR** (keep for your records) www.irs.gov/Form1099PATR Department of the Treasury - Internal Revenue Service

QR CODE WITH TAX DOCUMENT DATA

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FINANCIAL DATA EXCHANGE

Form 1099-Q, Payments From Qualified Education Programs

☐ CORRECTED (if checked)

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)
Financial Intelligence Associates 12022 Sundown Valley Dr Suite 230 Reston, VA 20191 888-555-1212	$ 10000.00 2 Earnings $ 2000.00	Form **1099-Q** (Rev. November 2019) For calendar year 20 22	
PAYER'S/TRUSTEE'S TIN: 12-3456789 RECIPIENT'S TIN: xxx-xx-1234	3 Basis $ 3000.00	4 Trustee-to-trustee transfer ☑	**Copy B For Recipient**
RECIPIENT'S name Kris Q Public Street address (including apt. no.) 1 Main St City or town, state or province, country, and ZIP or foreign postal code Melrose, NY 12121	5 Distribution is from: • Qualified tuition program— Private ☑ **or** State ☐ • Coverdell ESA ☐	6 If this box is checked, the recipient is not the designated beneficiary ☑	This is important tax information and is being furnished to the IRS. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.
Account number (see instructions) 111-55555555	If the fair market value (FMV) is shown below, see **Pub. 970**, Tax Benefits for Education, for how to figure earnings.		

Form **1099-Q** (Rev. 11-2019) (keep for your records) www.irs.gov/Form1099Q Department of the Treasury - Internal Revenue Service

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FINANCIAL DATA EXCHANGE

Form 1099-QA, Distributions From ABLE Accounts

☐ CORRECTED (if checked)

PAYER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no.		1 Gross distribution	OMB No. 1545-2262	Distributions From ABLE Accounts
Financial Intelligence Associates 12022 Sundown Valley Dr Suite 230 Reston, VA 20191 888-555-1212		$ 12000.00 2 Earnings $ 2400.00	2022 Form 1099-QA	
PAYER'S TIN 12-3456789	RECIPIENT'S TIN xxx-xx-1234	3 Basis $ 6000.00	4 Program-to-program transfer ☑	**Copy B** **For Recipient**
RECIPIENT'S name Kris Q Public Street address (including apt. no.) 1 Main St City or town, state or province, country, and ZIP or foreign postal code Melrose, NY 12121		5 If checked, ABLE account terminated in 2022 ☑	6 If this box is checked, the recipient is not the designated beneficiary ☑	This is important tax information and is being furnished to the IRS. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.
Account number (see instructions) 111-55555555				

Form **1099-QA** (keep for your records) www.irs.gov/Form1099QA Department of the Treasury - Internal Revenue Service

QR CODE WITH TAX DOCUMENT DATA

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https://financialdataexchange.org/us-tax

FINANCIAL DATA EXCHANGE

Form 1099-R, Distributions from Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs,… etc.

☐ CORRECTED (if checked)

PAYER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no. **Financial Intelligence Associates** **12022 Sundown Valley Dr** **Suite 230** **Reston, VA 20191** **888-555-1212**	1 Gross distribution $ **100000.00** 2a Taxable amount $ **21000.00**	OMB No. 1545-0119 2022 Form **1099-R**	**Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.**
	2b Taxable amount not determined ☐	Total distribution ☑	**Copy B**
PAYER'S TIN **12-3456789** / RECIPIENT'S TIN **xxx-xx-1234**	3 Capital gain (included in box 2a) $ **3000.00**	4 Federal income tax withheld $ **4000.00**	**Report this income on your federal tax return. If this form shows federal income tax withheld in box 4, attach this copy to your return.**
RECIPIENT'S name **Kris Q Public**	5 Employee contributions/ Designated Roth contributions or insurance premiums $ **5000.00**	6 Net unrealized appreciation in employer's securities $ **6000.00**	
Street address (including apt. no.) **1 Main St**	7 Distribution code(s) **A** / IRA/ SEP/ SIMPLE ☑	8 Other $ %	This information is being furnished to the IRS.
City or town, state or province, country, and ZIP or foreign postal code **Melrose, NY 12121**	9a Your percentage of total distribution %	9b Total employee contributions $ **9200.00**	
10 Amount allocable to IRR within 5 years $ **1000.00** / 11 1st year of desig. Roth contrib. **2012** / 12 FATCA filing requirement ☐	14 State tax withheld $ **1400.00** $	15 State/Payer's state no. **NY/State Id**	16 State distribution $ **16000.00** $
Account number (see instructions) **111-23456** / 13 Date of payment **04/01/2022**	17 Local tax withheld $ $	18 Name of locality	19 Local distribution $ $

Form **1099-R** www.irs.gov/Form1099R Department of the Treasury - Internal Revenue Service

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https://financialdataexchange.org/us-tax

FINANCIAL DATA EXCHANGE

Form 1099-S, Proceeds From Real Estate Transactions

☐ CORRECTED (if checked)

FILER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone number **Financial Intelligence Associates** **12022 Sundown Valley Dr** **Suite 230** **Reston, VA 20191** **888-555-1212**	1 Date of closing **04/01/2019** 2 Gross proceeds $ **200000.00**	OMB No. 1545-0997 Form **1099-S** (Rev. January 2022) For calendar year 20 **22**	**Proceeds From Real Estate Transactions**
FILER'S TIN **12-3456789** / TRANSFEROR'S TIN **xxx-xx-1234**	3 Address (including city, state, and ZIP code) or legal description **2 Main St, Melrose, NY 12121**		**Copy B** **For Transferor** This is important tax information and is being furnished to the IRS. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this item is required to be reported and the IRS determines that it has not been reported.
TRANSFEROR'S name **Kris Q Public** Street address (including apt. no.) **1 Main St** City or town, state or province, country, and ZIP or foreign postal code **Melrose, NY 12121**	4 Transferor received or will receive property or services as part of the consideration (if checked) . . . ▶ ☑ 5 If checked, transferor is a foreign person (nonresident alien, foreign partnership, foreign estate, or foreign trust) . . . . ▶ ☐		
Account number (see instructions) **111-23456**	6 Buyer's part of real estate tax $ **600.00**		

Form **1099-S** (Rev. 1-2022) (keep for your records) www.irs.gov/Form1099S Department of the Treasury - Internal Revenue Service

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FINANCIAL DATA EXCHANGE

Form 1099-SA, Distributions From an HSA, Archer MSA, or Medicare Advantage MSA

☐ CORRECTED (if checked)

TRUSTEE'S/PAYER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone number Financial Intelligence Associates 12022 Sundown Valley Dr Suite 230 Reston, VA 20191 888-555-1212		OMB No. 1545-1517 Form **1099-SA** (Rev. November 2019) For calendar year 20 22	**Distributions From an HSA, Archer MSA, or Medicare Advantage MSA**
PAYER'S TIN: 12-3456789 RECIPIENT'S TIN: xxx-xx-1234	**1** Gross distribution $ 1000.00	**2** Earnings on excess cont. $ 200.00	**Copy B For Recipient**
RECIPIENT'S name Kris Q Public	**3** Distribution code A	**4** FMV on date of death $ 400.00	
Street address (including apt. no.) 1 Main St City or town, state or province, country, and ZIP or foreign postal code Melrose, NY 12121	**5** HSA ☑ Archer MSA ☐ MA MSA ☐		This information is being furnished to the IRS.
Account number (see instructions) 111-23456			

Form **1099-SA** (Rev. 11-2019) (keep for your records) www.irs.gov/Form1099SA Department of the Treasury - Internal Revenue Service

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For more information about how this code can be used visit:
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FINANCIAL DATA EXCHANGE

Form 1099-SB, Seller's Investment in Life Insurance Contract

☐ CORRECTED (if checked)

ISSUER'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no. **Financial Intelligence Associates** **12022 Sundown Valley Dr** **Suite 230** **Reston, VA 20191** **888-555-1212**	1 Investment in contract $ **60000.00** 2 Surrender amount $ **45000.00**	OMB No. 1545-2281 Form **1099-SB** (Rev. December 2019) For calendar year 20 22	**Seller's Investment in Life Insurance Contract**
ISSUER'S TIN **12-3456789** | SELLER'S TIN **xxx-xx-1234**	Issuer's information contact name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone no. (if different from ISSUER) **Kris Q Public** **1 Main St** **Melrose, NY 12121**		**Copy B** **For Seller** This is important tax information and is being furnished to the IRS. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this item is required to be reported and the IRS determines that it has not been reported.
SELLER'S name **Kris Q Public** Street address (including apt. no.) **1 Main St** City or town, state or province, country, and ZIP or foreign postal code **Melrose, NY 12121**			
Policy number **987-65-4321**			

Form **1099-SB** (Rev. 12-2019) (keep for your records) www.irs.gov/Form1099SB Department of the Treasury - Internal Revenue Service

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FINANCIAL DATA EXCHANGE

Form 2439, Notice to Shareholder of Undistributed Long-Term Capital Gains

☐ VOID ☐ CORRECTED

Name, address, and ZIP code of RIC or REIT **Financial Intelligence Associates** **12022 Sundown Valley Dr** **Suite 230** **Reston, VA 20191**	OMB No. 1545-0123 Form **2439** (Rev. November 2021)	**Notice to Shareholder of Undistributed Long-Term Capital Gains** For calendar year 20 22, or other tax year of the regulated investment company (RIC) or the real estate investment trust (REIT) beginning ________, 20 ____, and ending ________, 20 ____
Identification number of RIC or REIT **12-3456789**	**1a** Total undistributed long-term capital gains **1100.00**	**Copy B** Attach to the shareholder's income tax return for the tax year that includes the last day of the RIC's or REIT's tax year.
Shareholder's identifying number **xxx-xx-1234**	**1b** Unrecaptured section 1250 gain **120.00**	
Shareholder's name, address, and ZIP code **Kris Q Public** **1 Main St** **Melrose, NY 12121**	**1c** Section 1202 gain **130.00** / **1d** Collectibles (28%) gain **140.00** **2** Tax paid by the RIC or REIT on the box 1a gains **200.00**	

Form **2439** (Rev. 11-2021) www.irs.gov/Form2439 Department of the Treasury - Internal Revenue Service

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FINANCIAL DATA EXCHANGE

Form 3921, Exercise of an Incentive Stock Option Under Section 422(b)

☐ CORRECTED (if checked)

TRANSFEROR'S name, street address, city or town, state or province, country, and ZIP or foreign postal code **Financial Intelligence Associates** **12022 Sundown Valley Dr** **Suite 230** **Reston, VA 20191**	**1** Date option granted **03/01/2022** **2** Date option exercised **07/01/2022**	OMB No. 1545-2129 **Form 3921** (Rev. October 2017)	**Exercise of an Incentive Stock Option Under Section 422(b)**
TRANSFEROR'S TIN **12-3456789** / EMPLOYEE'S TIN **xxx-xx-1234**	**3** Exercise price per share $ **50.00**	**4** Fair market value per share on exercise date $ **55.00**	**Copy B** **For Employee**
EMPLOYEE'S name **Kris Q Public** Street address (including apt. no.) **1 Main St** City or town, state or province, country, and ZIP or foreign postal code **Melrose, NY 12121**	**5** No. of shares transferred **100.00**		This is important tax information and is being furnished to the IRS. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this item is required to be reported and the IRS determines that it has not been reported.
Account number (see instructions) **111-23456**	**6** If other than TRANSFEROR, name, address, and TIN of corporation whose stock is being transferred **Financial Intelligence Associates** **12022 Sundown Valley Dr** **Suite 230** **Reston, VA 20191**		

Form **3921** (Rev. October 2017) (keep for your records) www.irs.gov/Form3921 Department of the Treasury - Internal Revenue Service

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For more information about how this code can be used visit:
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FINANCIAL DATA EXCHANGE

Form 3922, Transfer of Stock Acquired Through an Employee Stock Purchase Plan

☐ CORRECTED

CORPORATION'S name, street address, city or town, state or province, country, and ZIP or foreign postal code **Financial Intelligence Associates** **12022 Sundown Valley Dr** **Reston, VA 20191**		1 Date option granted **04/01/2022** 2 Date option exercised **07/01/2022**	OMB No. 1545-2129 **Form 3922** (Rev. September 2016)	**Transfer of Stock Acquired Through an Employee Stock Purchase Plan Under Section 423(c)**
CORPORATION'S federal identification number **12-3456789**	EMPLOYEE'S identification number **xxx-xx-1234**	3 Fair market value per share on grant date $ **30.00**	4 Fair market value per share on exercise date $ **40.00**	**Copy B** **For Employee**
EMPLOYEE'S name **Kris Q Public** Street address (including apt. no.) **1 Main St** City or town, state or province, country, and ZIP or foreign postal code **Melrose, NY 12121**		5 Exercise price paid per share $ **25.00** 7 Date legal title transferred **07/15/2022**	6 No. of shares transferred **100.00**	This is important tax information and is being furnished to the Internal Revenue Service.
Account number (see instructions) **111-23456**		8 Exercise price per share determined as if the option was exercised on the date shown in box 1 $ **26.00**		

Form **3922** (Rev. 9-2016) (keep for your records) www.irs.gov/form3922 Department of the Treasury - Internal Revenue Service

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FINANCIAL DATA EXCHANGE

Form 5498, IRA Contribution Information

☐ CORRECTED (if checked)

TRUSTEE'S or ISSUER'S name, street address, city or town, state or province, country, and ZIP or foreign postal code

Financial Intelligence Associates
12022 Sundown Valley Dr
Suite 230
Reston, VA 20191
888-555-1212

1 IRA contributions (other than amounts in boxes 2–4, 8–10, 13a, and 14a)	$ 1000.00
2 Rollover contributions	$ 200.00

OMB No. 1545-0747

2022

Form **5498**

IRA Contribution Information

TRUSTEE'S or ISSUER'S TIN	12-3456789
PARTICIPANT'S TIN	xxx-xx-1234
3 Roth IRA conversion amount	$ 300.00
4 Recharacterized contributions	$ 400.00
5 FMV of account	$ 5000.00
6 Life insurance cost included in box 1	$ 600.00

Copy B

For Participant

This information is being furnished to the IRS.

PARTICIPANT'S name

Kris Q Public

7 IRA ☑ SEP ☐ SIMPLE ☐ Roth IRA ☐

8 SEP contributions	$ 800.00
9 SIMPLE contributions	$ 900.00

Street address (including apt. no.)

1 Main St

10 Roth IRA contributions	$ 1000.00
11 If checked, required minimum distribution for 2023	☑
12a RMD date	04/01/2022
12b RMD amount	$ 1220.00

City or town, state or province, country, and ZIP or foreign postal code

Melrose, NY 12121

13a Postponed/late contrib.	$ 1310.00
13b Year	2017
13c Code	P
14a Repayments	$ 141.00
14b Code	A

Account number (see instructions)

12-3456789

15a FMV of certain specified assets	$ 151.00
15b Code(s)	B

Form **5498** (keep for your records) www.irs.gov/Form5498 Department of the Treasury - Internal Revenue Service

QR CODE WITH TAX DOCUMENT DATA

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FINANCIAL DATA EXCHANGE

Form 5498-ESA, Coverdell ESA Contribution Information

☐ CORRECTED

TRUSTEE'S or ISSUER'S name, street address, city or town, state or province, country, and ZIP or foreign postal code **Financial Intelligence Associates** **12022 Sundown Valley Dr** **Reston, VA 20191**		**1** Coverdell ESA contributions $ 1000.00 **2** Rollover contributions $ 2000.00	OMB No. 1545-1815 2022 Form **5498-ESA**	**Coverdell ESA Contribution Information**
TRUSTEE'S/ISSUER'S TIN 12-3456789	BENEFICIARY'S TIN XXX-XX-1234			**Copy B** **For Beneficiary** This information is being furnished to the IRS.
BENEFICIARY'S name Kris Q. Public Street address (including apt. no.) 1 Main St City or town, state or province, country, and ZIP or foreign postal code Melrose, NY 12121				
Account number (see instructions) 123-1234567				

Form **5498-ESA** (keep for your records) www.irs.gov/Form5498ESA Department of the Treasury - Internal Revenue Service

QR CODE WITH TAX DOCUMENT DATA

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FINANCIAL DATA EXCHANGE

Form 5498-QA, ABLE Account Contribution Information

☐ CORRECTED

ISSUER'S name, street address, city or town, state or province, country, and ZIP or foreign postal code **Financial Intelligence Associates** **12022 Sundown Valley Dr** **Reston, VA 20191**		**1** ABLE contributions $ **2000.00** **2** ABLE to ABLE Rollovers $ **200.00**	OMB No. 1545-2262 2022 Form **5498-QA**	**ABLE Account Contribution Information**
ISSUER'S TIN **12-3456789**	BENEFICIARY'S TIN **XXX-XX-1234**	**3** Cumulative contributions $ **3500.00**	**4** Fair market value $ **8000.00**	**Copy B** **For Beneficiary** This information is being furnished to the IRS.
BENEFICIARY'S name **Kris Q. Public** Street address (including apt. no.) **1 Main St** City or town, state or province, country, and ZIP or foreign postal code **Melrose, NY 12121**		**5** If checked, account was opened in 2022 ☐ **7** Code **6**	**6** Basis of eligibility **C**	
Account number (see instructions) **123-1234567**				

Form **5498-QA** (keep for your records) www.irs.gov/Form5498QA Department of the Treasury - Internal Revenue Service

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FINANCIAL DATA EXCHANGE

Form 5498-SA, HSA, Archer MSA, or Medicare Advantage MSA Information

☐ CORRECTED (if checked)

TRUSTEE'S name, street address, city or town, state or province, country, ZIP or foreign postal code, and telephone number **Financial Intelligence Associates** **12022 Sundown Valley Dr** **Reston, VA 20191**	**1** Employee or self-employed person's Archer MSA contributions made in 2022 and 2023 for 2022 $ **2** Total contributions made in 2022 $ **3000.00**	OMB No. 1545-1518 **2022** Form **5498-SA**	**HSA, Archer MSA, or Medicare Advantage MSA Information**
TRUSTEE'S TIN **12-3456789** / PARTICIPANT'S TIN **XXX-XX-1234**	**3** Total HSA or Archer MSA contributions made in 2023 for 2022 $ **300.00**		**Copy B**
PARTICIPANT'S name **Kris Q. Public**	**4** Rollover contributions $ **200.00**	**5** Fair market value of HSA, Archer MSA, or MA MSA $ **10000.00**	**For Participant**
Street address (including apt. no.) **1 Main St** City or town, state or province, country, and ZIP or foreign postal code **Melrose, NY 12121**	**6** HSA ☑ Archer MSA ☐ MA MSA ☐		This information is being furnished to the IRS.
Account number (see instructions) **123-1234567**			

Form **5498-SA** (keep for your records) www.irs.gov/Form5498SA Department of the Treasury - Internal Revenue Service

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https://financialdataexchange.org/us-tax

FINANCIAL DATA EXCHANGE

Form W-2, Wage and Tax Statement

a Employee's social security number XXX-XX-1234	OMB No. 1545-0008	Safe, accurate, FAST! Use IRS e-file	Visit the IRS website at www.irs.gov/efile
b Employer identification number (EIN) 12-3456789		1 Wages, tips, other compensation 44416.74	2 Federal income tax withheld 6907.16
c Employer's name, address, and ZIP code Financial Intelligence Associates 12022 Sundown Valley Dr Suite 230 Reston, VA 20191		3 Social security wages 47162.92	4 Social security tax withheld 2924.10
		5 Medicare wages and tips 47162.92	6 Medicare tax withheld 683.86
		7 Social security tips	8 Allocated tips
d Control number 012547 WY/OA7		9	10 Dependent care benefits
e Employee's first name and initial: Kris Q	Last name: Public / Suff.	11 Nonqualified plans	12a See instructions for box 12 Code C: 301.50
1 Main St Melrose, NY 12121		13 Statutory employee ☐ Retirement plan ☒ Third-party sick pay ☐	12b Code D: 2746.18
		14 Other	12c Code DD: 4781.88
f Employee's address and ZIP code			12d Code

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
OH	OH 036-133505158F-01	44416.74	1726.78	44416.74	427.62	Kirtland

Form **W-2** **Wage and Tax Statement** 2022

Department of the Treasury—Internal Revenue Service

Copy B—To Be Filed With Employee's FEDERAL Tax Return.
This information is being furnished to the Internal Revenue Service.

QR CODE WITH TAX DOCUMENT DATA

The Financial Data Exchange standards-setting organization defines the use of QR codes for US Tax data.

For more information about how this code can be used visit:
https://financialdataexchange.org/us-tax

FINANCIAL DATA EXCHANGE

Form W-2G, Certain Gambling Winnings

2022 Tax Information

QR CODE WITH TAX DOCUMENT DATA

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https://financialdataexchange.org/us-tax

FINANCIAL DATA EXCHANGE

44444 | For Official Use Only ▶ OMB No. 1545-0008 | Safe, accurate, FAST! Use IRS e-file | Visit the IRS website at www.irs.gov.

a Employer's name, address, and ZIP code Financial Intelligence Associates 12022 Sundown Valley Dr Suite 230 Reston, VA 20191	c Tax year/Form corrected: 2022 / W-2 d Employee's correct SSN: XXX-XX-1234 e Corrected SSN and/or name (Check this box and complete boxes f and/or g if incorrect on form previously filed.) ☐ Complete boxes f and/or g only if incorrect on form **previously filed** ▶ f Employee's **previously reported** SSN: XXX-XX-1234
b Employer's Federal EIN: 12-3456789	g Employee's **previously reported** name: Kris Q Public
	h Employee's first name and initial: Kris Q · Last name: Public · Suff.: 1 Main St Melrose, NY 12121 i Employee's address and ZIP code

Note. Only complete money fields that are being corrected (exception: for corrections involving MQGE, see the General Instructions for Forms W-2 and W-3, under Specific Instructions for Form W-2c, boxes 5 and 6).

Previously reported	Correct information	Previously reported	Correct information
1 Wages, tips, other compensation: 44416.74	1 Wages, tips, other compensation: 44416.74	2 Federal income tax withheld: 6907.16	2 Federal income tax withheld: 6907.16
3 Social security wages: 47162.92	3 Social security wages: 47162.92	4 Social security tax withheld: 2924.10	4 Social security tax withheld: 2924.10
5 Medicare wages and tips: 47162.92	5 Medicare wages and tips: 47162.92	6 Medicare tax withheld: 683.86	6 Medicare tax withheld: 683.86
7 Social security tips	7 Social security tips	8 Allocated tips	8 Allocated tips
9	9	10 Dependent care benefits	10 Dependent care benefits
11 Nonqualified plans	11 Nonqualified plans	12a See instructions for box 12: Code C 301.50	12a See instructions for box 12: Code D 2746.18
13 Statutory employee ☐ Retirement plan ☑ Third-party sick pay ☐	13 Statutory employee ☐ Retirement plan ☑ Third-party sick pay ☐	12b Code D 2746.18	12b Code D 2746.18
14 Other (see instructions)	14 Other (see instructions)	12c Code DD 4781.88	12c Code DD 5781.88
		12d Code	12d Code

Sample

State Correction Information

Previously reported	Correct information	Previously reported	Correct information
15 State: OH	15 State: OH	15 State	15 State
Employer's state ID number: OH 036-133505158F-01	Employer's state ID number: OH 036-133505158F-01	Employer's state ID number	Employer's state ID number
16 State wages, tips, etc.: 44416.74	16 State wages, tips, etc.: 44416.74	16 State wages, tips, etc.	16 State wages, tips, etc.
17 State income tax: 1726.78	17 State income tax: 1726.78	17 State income tax	17 State income tax

Locality Correction Information

Previously reported	Correct information	Previously reported	Correct information
18 Local wages, tips, etc.: 44416.74	18 Local wages, tips, etc.: 44416.74	18 Local wages, tips, etc.	18 Local wages, tips, etc.
19 Local income tax: 427.62	19 Local income tax: 427.62	19 Local income tax	19 Local income tax
20 Locality name: Kirtland	20 Locality name: Kirtland	20 Locality name	20 Locality name

Copy B—To Be Filed with Employee's FEDERAL Tax Return

Form **W-2c** (Rev. 8-2014) **Corrected Wage and Tax Statement** Department of the Treasury Internal Revenue Service

Form W-2G, Certain Gambling Winnings

☐ CORRECTED (if checked)

PAYER'S name, street address, city or town, province or state, country, and ZIP or foreign postal code **Financial Intelligence Associates** **12022 Sundown Valley Dr** **Reston, VA 20191**		1 Reportable winnings $ **24075.65**	2 Date won **04/01/2022**	OMB No. 1545-0238 **Form W-2G** **Certain Gambling Winnings** (Rev. January 2021) For calendar year 20 **22**
		3 Type of wager **HHR Jackpot**	**4 Federal income tax withheld** $ **6018.91**	
		5 Transaction **VCH#334249**	6 Race **$1 Tiki Bar**	
		7 Winnings from identical wagers $	8 Cashier **NC 3370**	
PAYER'S federal identification number **12-3456789**	PAYER'S telephone number **702-555-1212 x. 711**	9 Winner's taxpayer identification no. **123-45-6789**	10 Window **MI0905**	This information is being furnished to the Internal Revenue Service.
WINNER'S name **Kris Q. Public**		11 First identification **WY DL 123456-789**	12 Second identification **123-45-6789**	
Street address (including apt. no.) **1 Main St**		13 State/Payer's state identification no.	14 State winnings $	**Copy B** **Report this income on your federal tax return. If this form shows federal income tax withheld in box 4, attach this copy to your return.**
City or town, province or state, country, and ZIP or foreign postal code **Melrose, NY 12121**		15 State income tax withheld $	16 Local winnings $	
		17 Local income tax withheld $	18 Name of locality	

Under penalties of perjury, I declare that, to the best of my knowledge and belief, the name, address, and taxpayer identification number that I have furnished correctly identify me as the recipient of this payment and any payments from identical wagers, and that no other person is entitled to any part of these payments.

Signature ▶ **Date ▶**

Form **W-2G** (Rev. 1-2021) www.irs.gov/FormW2G Department of the Treasury - Internal Revenue Service

QR CODE WITH TAX DOCUMENT DATA

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For more information about how this code can be used visit:
https://financialdataexchange.org/us-tax

FINANCIAL DATA EXCHANGE

Form 1042-S Foreign Person's US Source Income Subject to Withholding

2022 Tax Information

QR CODE WITH TAX DOCUMENT DATA

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For more information about how this code can be used visit:
https://financialdataexchange.org/us-tax

FINANCIAL DATA EXCHANGE

Form **1042-S** Department of the Treasury Internal Revenue Service

Foreign Person's U.S. Source Income Subject to Withholding 2022

► Go to *www.irs.gov/Form1042S* for instructions and the latest information.

0 1 2 3 4 5 6 7 8 9 UNIQUE FORM IDENTIFIER ☐ AMENDED ☐ AMENDMENT NO.

OMB No. 1545-0096

Copy B for Recipient

1 Income code: 16	2 Gross income: 205.00
3 Chapter indicator. Enter "3" or "4": 4	
3a Exemption code: 11	4a Exemption code: 00
3b Tax rate: 3 . 08	4b Tax rate: 4 . 1
5 Withholding allowance: 5011.00	
6 Net income: 6012.00	
7a Federal tax withheld: 7013.00	
7b Check if federal tax withheld was not deposited with the IRS because escrow procedures were applied (see instructions) . . . . . . ☐	
7c Check if withholding occurred in subsequent year with respect to a partnership interest . . . . ☑	
8 Tax withheld by other agents: 8016.00	
9 Overwithheld tax repaid to recipient pursuant to adjustment procedures (see instructions): (9017.00)	
10 Total withholding credit (combine boxes 7a, 8, and 9): 24046.00	
11 Tax paid by withholding agent (amounts not withheld) (see instructions): 11019.00	
12a Withholding agent's EIN: 12-3456789	12b Ch. 3 status code: 15 / 12c Ch. 4 status code: 02
12d Withholding agent's name: Financial Intelligence Associates	
12e Withholding agent's Global Intermediary Identification Number (GIIN): 01234576890	
12f Country code: CA	12g Foreign tax identification number, if any: 991234567
12h Address (number and street): 12022 Sundown Valley Dr	
12i City or town, state or province, country, ZIP or foreign postal code: Reston, VA 20191	
13a Recipient's name: Kris Q. Public	13b Recipient's country code: CA
13c Address (number and street): 1 Main St	
13d City or town, state or province, country, ZIP or foreign postal code: Melrose, NY 12121	

13e Recipient's U.S. TIN, if any: xxx-xx-1234	13f Ch. 3 status code: 16 / 13g Ch. 4 status code: 02
13h Recipient's GIIN	13i Recipient's foreign tax identification number, if any: 987654300 / 13j LOB code: 11
13k Recipient's account number: xxxxxxx4455	
13l Recipient's date of birth (YYYYMMDD): 1 9 4 2 1 2 2 1	
14a Primary Withholding Agent's Name (if applicable): Primary W. Agent	
14b Primary Withholding Agent's EIN: 00-1122334	15 Check if pro-rata basis reporting ☐
15a Intermediary or flow-through entity's EIN, if any: 88-8888888	15b Ch. 3 status code: 02 / 15c Ch. 4 status code: 16
15d Intermediary or flow-through entity's name: Contact Name	
15e Intermediary or flow-through entity's GIIN: 12345768999	
15f Country code: CA	15g Foreign tax identification number, if any: 987654321
15h Address (number and street): 1718-1/2 Oak Blvd	
15i City or town, state or province, country, ZIP or foreign postal code: Austin, TX 78735	
16a Payer's name: Financial Intelligence Associates Payer	16b Payer's TIN: 99-0011223
16c Payer's GIIN: 00123457689	16d Ch. 3 status code: 15 / 16e Ch. 4 status code: 02
17a State income tax withheld: 17025.00	17b Payer's state tax no.: 001234567 / 17c Name of state: NY

(keep for your records)

Form **1042-S** (2022)

Form 1041 Schedule K1

2022 Tax Information

QR CODE WITH TAX DOCUMENT DATA

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FINANCIAL DATA EXCHANGE

661117

☒ Final K-1 ☐ Amended K-1 OMB No. 1545-0092

Schedule K-1 (Form 1041) **2022**

Department of the Treasury
Internal Revenue Service

For calendar year 2022, or tax year

beginning 01 / 01 / 2022 ending 12 / 31 / 2022

Beneficiary's Share of Income, Deductions, Credits, etc.

See back of form and instructions.

Part I Information About the Estate or Trust

A Estate's or trust's employer identification number

12-3456789

B Estate's or trust's name

American People's Trust

C Fiduciary's name, address, city, state, and ZIP code

American People Corp.
1718-1/2 Oak Blvd
Suite 230
Austin, TX 78735

D ☒ Check if Form 1041-T was filed and enter the date it was filed

05/01/2022

E ☒ Check if this is the final Form 1041 for the estate or trust

Part II Information About the Beneficiary

F Beneficiary's identifying number

xxx-xx-1234

G Beneficiary's name, address, city, state, and ZIP code

Kris Q. Public
1 Main St
Melrose, NY 12121

H ☒ Domestic beneficiary ☐ Foreign beneficiary

Part III Beneficiary's Share of Current Year Income, Deductions, Credits, and Other Items

1	Interest income	1013.00
2a	Ordinary dividends	2014.00
2b	Qualified dividends	2015.00
3	Net short-term capital gain	3016.00
4a	Net long-term capital gain	4017.00
4b	28% rate gain	4018.00
4c	Unrecaptured section 1250 gain	4019.00
5	Other portfolio and nonbusiness income	5020.00
6	Ordinary business income	6021.00
7	Net rental real estate income	7022.00
8	Other rental income	8023.00
9	Directly apportioned deductions	
	A	9024.00
10	Estate tax deduction	10025.00
11	Final year deductions	
	B	11026.00
	C	11026.00
12	Alternative minimum tax adjustment	
	D	12028.00
13	Credits and credit recapture	
	E	13030.00
14	Other information	
	G	14031.00
	H	14031.00

*See attached statement for additional information.

Note: A statement must be attached showing the beneficiary's share of income and directly apportioned deductions from each business, rental real estate, and other rental activity.

For IRS Use Only

For Paperwork Reduction Act Notice, see the Instructions for Form 1041. *www.irs.gov/Form1041* Cat. No. 11380D **Schedule K-1 (Form 1041) 2022**

Form 1065 Schedule K1

2022 Tax Information

QR CODE WITH TAX DOCUMENT DATA

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For more information about how this code can be used visit:
https://financialdataexchange.org/us-tax

FINANCIAL DATA EXCHANGE

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☒ Final K-1 ☐ Amended K-1 OMB No. 1545-0123

Schedule K-1 (Form 1065) **2022**

Department of the Treasury
Internal Revenue Service

For calendar year 2022, or tax year

beginning 01 / 01 / 2022 ending 12 / 31 / 2022

Partner's Share of Income, Deductions, Credits, etc.

See separate instructions.

Part I Information About the Partnership

A Partnership's employer identification number
12-3456789

B Partnership's name, address, city, state, and ZIP code
American People Corp.
1718-1/2 Oak Blvd
Suite 230
Austin, TX 78735

C IRS center where partnership filed return: Ogden

D ☒ Check if this is a publicly traded partnership (PTP)

Part II Information About the Partner

E Partner's SSN or TIN (Do not use TIN of a disregarded entity. See instructions.)
xxx-xx-1234

F Name, address, city, state, and ZIP code for partner entered in E. See instructions.
Kris Q. Public
1 Main St
Melrose, NY 12121

G ☒ General partner or LLC member-manager ☐ Limited partner or other LLC member

H1 ☒ Domestic partner ☐ Foreign partner

H2 ☐ If the partner is a disregarded entity (DE), enter the partner's:
TIN ____ Name ____

I1 What type of entity is this partner? LLC

I2 If this partner is a retirement plan (IRA/SEP/Keogh/etc.), check here . ☐

J Partner's share of profit, loss, and capital (see instructions):

	Beginning	Ending
Profit	20.00 %	21.00 %
Loss	22.00 %	23.00 %
Capital	24.00 %	25.00 %

Check if decrease is due to sale or exchange of partnership interest . . ☐

K Partner's share of liabilities:

	Beginning	Ending
Nonrecourse . . .	$ 27.00	$ 28.00
Qualified nonrecourse financing . . .	$ 29.00	$ 30.00
Recourse . . .	$ 31.00	$ 32.00

Check this box if item K includes liability amounts from lower-tier partnerships ☐

L **Partner's Capital Account Analysis**

Beginning capital account . . .	$ 134.00
Capital contributed during the year . .	$ 135.00
Current year net income (loss) . . .	$ 136.00
Other increase (decrease) (attach explanation)	$ 137.00
Withdrawals and distributions . . .	$ (138.00)
Ending capital account	$ 139.00

M Did the partner contribute property with a built-in gain (loss)?
☐ **Yes** ☐ **No** If "Yes," attach statement. See instructions.

N **Partner's Share of Net Unrecognized Section 704(c) Gain or (Loss)**

Beginning	$ 246.00
Ending	$ 247.00

Part III Partner's Share of Current Year Income, Deductions, Credits, and Other Items

1	Ordinary business income (loss)		1048.00
2	Net rental real estate income (loss)		2049.00
3	Other net rental income (loss)		3050.00
4a	Guaranteed payments for services		4252.00
4b	Guaranteed payments for capital		4353.00
4c	Total guaranteed payments		4151.00
5	Interest income		5054.00
6a	Ordinary dividends		6155.00
6b	Qualified dividends		6256.00
6c	Dividend equivalents		6357.00
7	Royalties		7058.00
8	Net short-term capital gain (loss)		8059.00
9a	Net long-term capital gain (loss)		9160.00
9b	Collectibles (28%) gain (loss)		9261.00
9c	Unrecaptured section 1250 gain		9362.00
10	Net section 1231 gain (loss)		10063.00
11	Other income (loss)	I	11064.00
12	Section 179 deduction		12065.00
13	Other deductions	O	13066.00
14	Self-employment earnings (loss)	S	14067.00
15	Credits	C	15068.00
16	Schedule K-3 is attached if checked . . . . . ☐		
17	Alternative minimum tax (AMT) items	W	17071.00
18	Tax-exempt income and nondeductible expenses	X	18072.00
19	Distributions	Y	19073.00
20	Other information	Z	20074.00
21	Foreign taxes paid or accrued		

22 ☒ More than one activity for at-risk purposes*
23 ☐ More than one activity for passive activity purposes*

*See attached statement for additional information.

For IRS Use Only

For Paperwork Reduction Act Notice, see the Instructions for Form 1065. www.irs.gov/Form1065 Cat. No. 11394R **Schedule K-1 (Form 1065) 2022**

Form 1120-S Schedule K1

2022 Tax Information

QR CODE WITH TAX DOCUMENT DATA

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FINANCIAL DATA EXCHANGE

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☒ Final K-1 ☐ Amended K-1 OMB No. 1545-0123

Schedule K-1 (Form 1120-S) 2022
Department of the Treasury
Internal Revenue Service

For calendar year 2022, or tax year

beginning 01 / 01 / 2022 ending 12 / 31 / 2022

Shareholder's Share of Income, Deductions, Credits, etc.

See separate instructions.

Part I Information About the Corporation

A Corporation's employer identification number
12-3456789

B Corporation's name, address, city, state, and ZIP code
American People Corp.
1718-1/2 Oak Blvd
Suite 230
Austin, TX 78735

C IRS Center where corporation filed return
Ogden

D Corporation's total number of shares
Beginning of tax year . . . . . .
End of tax year . . . .

Part II Information About the Shareholder

E Shareholder's identifying number
xxx-xx-1234

F Shareholder's name, address, city, state, and ZIP code
Kris Q. Public
1 Main St
Melrose, NY 12121

G Current year allocation percentage . . . 10.00 %

H Shareholder's number of shares
Beginning of tax year 110.00
End of tax year 120.00

I Loans from shareholder
Beginning of tax year . . . . . . $ 1300.00
End of tax year . . . . $ 1400.00

For IRS Use Only

Part III Shareholder's Share of Current Year Income, Deductions, Credits, and Other Items

1		Ordinary business income (loss)	1015.00
2		Net rental real estate income (loss)	2016.00
3		Other net rental income (loss)	3017.00
4		Interest income	4018.00
5a		Ordinary dividends	5119.00
5b		Qualified dividends	5220.00
6		Royalties	6021.00
7		Net short-term capital gain (loss)	7022.00
8a		Net long-term capital gain (loss)	8123.00
8b		Collectibles (28%) gain (loss)	8224.00
8c		Unrecaptured section 1250 gain	8325.00
9		Net section 1231 gain (loss)	9026.00
10	A	Other income (loss)	10027.00
11		Section 179 deduction	11028.00
12	A	Other deductions	12029.00
13	G	Credits	13030.00
14		Schedule K-3 is attached if checked . . . . . ☐	
15	D	Alternative minimum tax (AMT) items	15033.00
16	A	Items affecting shareholder basis	16034.00
17	A	Other information	17035.00

18 ☐ More than one activity for at-risk purposes*
19 ☐ More than one activity for passive activity purposes*

* See attached statement for additional information.

Sample

For Paperwork Reduction Act Notice, see the Instructions for Form 1120-S. www.irs.gov/Form1120S Cat. No. 11520D **Schedule K-1 (Form 1120-S) 2022**