

Information Returns Management**

Managing and filing information returns in multiple jurisdictions is challenging and complex.

MasterTax software streamlines cumbersome manual processes to help you avoid penalties and interest and help fulfill your compliance obligations.



With **Information Returns Management**, you benefit from:

- Payments and scheduling tools
- Multiple jurisdiction forms and filing coverage
 - Not just payroll tax forms
 - Reporting for both employees and 1099 recipients
 - Combined reporting across shared FEINs
 - Comprehensive forms generation, including but not limited to 1099s, 3921, 3922, 5498 and W-2G
- Electronic reporting and filing available, including federal, state and local agencies

MasterTax is here to help.

MasterTax.com

** Additional fees may apply

Information Returns Management**

Helps with importing details via a simplified CSV format. It also generates agency-ready and payee-ready* forms seamlessly, including 1099s, 3921, 3922, 5498 and W-2G.

Tax Return forms

945 - Annual Return of Withheld Federal Income Tax
945-X - Adjusted Annual Return of Withheld Federal Income Tax or Claim for Refund Income Tax

1099 Series

1099-NEC*, *Non-Employee Compensation*
1099-MISC*, *Miscellaneous*
1099-R*, *Distributions from Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.*
1099-A, *Acquisition or Abandonment of Secured Property*
1099-B, *Proceeds from Broker and Barter Exchange Transactions*
1099-C, *Cancellation of Debt*
1099-CAP – *Changes in Corporate Control and Capital Structure*
1099-DA – *Proceeds From Broker and Barter Exchange Transactions (Foreign Accounts)*
1099-DIV, *Dividends and Distributions*
1099-G – *Certain Government Payments*
1099-INT, *Interest Income*
1099-K – *Payment Card and Third Party Network Transactions*
1099-LS – *Reportable Life Insurance Sale*
1099-LTC, *Long-Term Care and Accelerated Death Benefits*
1099-(OID), *Original Issue Discount*
1099-PATR – *Taxable Distributions Received from Cooperatives*
1099-Q, *Payments from Qualified Education Programs*
1099-QA – *Distributions From ABLE Accounts*
1099-S – *Proceeds From Real Estate Transactions*
1099-SA, *Distributions from an HSA, Archer MSA, or Medicare Advantage MSA*
1099-SB, *Seller's Investment in Life Insurance*

** Additional fees may apply

***Don't see your form on this list?
Contact us: 1-480-667-7876***

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1097 Series

1097-BTC – Bond Tax Credit

1042 Series

1042 – Annual Withholding Tax Return for U.S. Source Income of Foreign Persons

Other Information Returns

3921 – Exercise of an Incentive Stock Option Under Section 422(b)
3922 – Transfer of Stock Acquired Through an Employee Stock Purchase Plan
5498 – IRA Contribution Information
5498-ESA – Coverdell ESA Contribution Information
5498-QA – ABLE Account Contribution Information
5498-SA – HAS, Archer MSA, or Medicare Advantage MSA Information
W-2G – Certain Gambling Winnings

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