

# W-2 and 1099 Filing Checklist

## Steps to Success

### Set Internal Business Processes

- Determine form processing method
- Confirm distribution method
- Mark all due dates on the calendar

### Prepare Data for Form Completion

- Confirm the correct classification of all workers
- Ensure you have the proper documentation for each
  - W-4s for all for all employees
  - W-9s for all for all independent contractors
- Gather essential payroll information

### File Forms 1099 and W-2

- Complete each form thoroughly
- File each form to the appropriate recipient
  - Copy to the worker
  - Copy to the IRS
  - Copy to the SSA (for W-2s)
- Save a copy for your business records
- Review state requirements