

W2, 1099R, 1099INT, 1099SA, 1095A, 5498

W2 - ISSUED FROM EMPLOYER

1099R - ISSUED FROM RETIREMENT PLAN AND INCLUDES DISTRIBUTIONS AND ROLLOVERS

1099INT - ISSUED FROM BANK OR MORTGAGE COMPANY AND RECORDS INTEREST PAID TO YOU FROM SAVINGS AND ESCROW ACCOUNTS- CAN ALSO INCLUDE INTEREST FROM BROKERAGE ACCT.

1099SA- ISSUED FROM SOCIAL SECURITY ADMINISTRATION - PINK AND WHITE FORM

1095A-ISSUED FROM HEALTH INSURANCE MARKETPLACE (COMMONLY CALLED OBAMACARE)

5498-ISSUED FROM BROKERAGE OR BANK WHEN CONTRIBUTION IS MADE TO A RETIREMENT PLAN, IRA AND 401K. CONTRIBUTIONS MADE THROUGH AN EMPLOYER DO NOT REQUIRE THIS FORM.

About Form W-2, Wage and Tax Statement

Information about Form W-2, Wage and Tax Statement, including recent updates, related forms and instructions on how to file. Form W-2 is filed by employers to report wages, tips, and other compensation paid to employees as well as FICA and withheld income taxes.

Form 1099-R, Distributions From Pensions, Annuities, Retirement or

Profit-Sharing Plans, IRAs, Insurance Contracts, etc. File Form 1099-R,

Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc., for each person to whom you have made a designated distribution or are treated as having made a distribution of \$10 or more from profit-sharing or retirement plans, any individual retirement arrangements (IRAs), annuities, pensions, insurance contracts, survivor income benefit plans, permanent and total disability payments under life insurance contracts, charitable gift annuities, etc. Also, report on Form 1099-R death benefit payments made by employers that are not made as part of a pension, profit-sharing, or retirement plan.

Form 1099-INT, Interest Income (Info Copy Only)

File Form 1099-INT, Interest Income, for each person 1) To whom you paid amounts reportable in boxes 1, 3, and 8 of at least \$10 (or at least \$600 of interest paid in the course of your trade or business); 2) For whom you withheld and paid any foreign tax on interest; or 3) From whom you withheld (and did not refund) any federal income tax under the backup withholding rules regardless of the amount of the payment.

Form 1095-A, Health Insurance Marketplace Statement

Form 1095-A, Health Insurance Marketplace Statement, is used to report certain information to the IRS about individuals who enroll in a qualified health plan through the Marketplace. Form 1095-A also is furnished to individuals to allow them to claim the premium tax credit, to reconcile the credit on their returns with advance payments of the premium tax credit (advance credit payments), and to file an accurate tax return.

Form 5498, IRA Contribution Information (Info Copy Only)

File Form 5498, IRA Contribution Information, for each person for whom you maintained any individual retirement arrangement (IRA), including a deemed IRA under section 408(q)