



# ftwilliam.com Software: 1099/945 Forms

The **ftwilliam.com** portfolio is fully web-based software that streamlines time-consuming tasks for the employee benefits professional. The applications are easy to use and integrated to ensure that data flows effortlessly between the different modules.

The **1099/945 Forms** module minimizes your manual data entry and delivers client forms instantly in PDF format.

## Included Forms

### 1099-R

1099-R - IRS Copy A  
1099-R - Payee Copies B, C, and 2  
1099-R - Payer Copy D  
1099-R - State Copy 1

### 1099 Misc

1099-Misc - IRS Copy A  
1099-Misc - Payee Copies B, 2,  
and payee instructions  
1099-Misc - Payer Copy C  
1099-Misc - State Copy 1

### 1099 Div

1099-Div - IRS Copy A  
1099-Div - Payee Copies B, 2,  
and payee instructions  
1099-Div - Payer Copy C  
1099-Div - State Copy 1

### 1096

### 945/945-A/945-V/945-X

### 5498

5498 - IRS Copy A  
5498 - Payee Copies B and payee  
instructions  
5498 - Payer Copy C

### 5498-SA (Years 2011–2015 only)

5498-SA - IRS Copy A  
5498-SA - Payee Copy B and  
payee instructions  
5498-SA - Payer Copy C

### 1099-SA

1099-SA - IRS Copy A  
1099-SA - Payee Copy B and  
payee instructions  
1099-SA - Payer Copy C

### 1099-INT

1099-INT - IRS Copy A  
1099-INT - Payee Copies B, 2,  
and payee instructions  
1099-INT - Payer Copy C

## Software Highlights

- 1099 Service Bureau—Our fulfillment service will e-file federal and state copies and mail your recipient copies on your behalf. Additional fees apply.
- Easy e-filing via FIRE is available with our data export feature.
- Upload payee data for all plans from a .csv template to avoid manual data entry.
- Deliver forms instantly in PDF format.
- Context-sensitive help buttons on every line item as well as extensive edit checking.
- Batch printing available for all forms.
- Payer data from the previous year's form automatically transferred to the current year.