TAXBANDITS®
Your 1099 & W2 Experts

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CPA to Team Members' Email Template

Hi **[Team]**,

As we move into the next phase of year-end preparation, you'll begin receiving 1099 and W-2 information from clients. Please review the guidance below to ensure all submissions are handled consistently and accurately.

What to Expect

- Clients will begin submitting forms and related data on or after **[insert date or timeframe]**.
- Information may arrive through **[portal/email/upload method]**; so check your assigned channels regularly.
- Confirm receipt of each submission and note any missing or late information on your client tracking sheet.

How to Confirm Information

- **Verify completeness:** Check that all required fields (legal name, TIN, payment amounts, addresses, etc.) are filled in.
- **Identify inconsistencies:** If anything appears incorrect or incomplete, compare against the prior year's records or internal notes.
- **Escalate issues:** If you're unsure how to correct or confirm questionable information, follow our established escalation process or notify your manager promptly.

Maintaining accuracy now helps avoid amendments and delays later in January. Thank you for staying attentive as forms start coming in.

Best regards,

[Your Name]