

Contractor 1099 Readiness Checklist

Review payee records, classification questions, payment totals, exclusions, corrections, delivery, and filing responsibilities before information returns are due.

FREE PDF RESOURCE	Free to view, download, print, and use internally as a general guide.
PUBLIC FORMAT	Watermarked public edition. Editing, assembly, and extraction are disabled in compliant PDF readers.
REUSABLE WORD VERSION	Available when this resource relates to a paid RiskWise engagement.

What this free resource includes

01 Payee and W-9 records

02 Classification review

03 Payment reconciliation

04 Form preparation controls

05 Corrections and delivery

Use the working pages to collect facts, owners, evidence, and dates. Review tax, legal, security, licensing, employment, insurance, or regulatory decisions with the qualified professional appropriate to your facts.

Work through Contractor 1099 Readiness Checklist

Record what is known, identify the source, assign an owner, and make missing information visible.

Payee and W-9 records

Purpose / facts / owner / evidence / date:

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Classification review

Purpose / facts / owner / evidence / date:

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Payment reconciliation

Purpose / facts / owner / evidence / date:

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Finish the record and confirm the next step

Complete the remaining sections, then identify what needs review, approval, secure delivery, implementation, or follow-up.

Form preparation controls

Purpose / facts / owner / evidence / date:

Corrections and delivery

Purpose / facts / owner / evidence / date:

Choose the support you need

FREE PDF	Free	Use this public edition as an internal reference or printed working guide.
REUSABLE WORD TEMPLATE	Included	An editable Word version is available when it supports a related paid engagement.
CUSTOM WORK	Scoped	RiskWise can adapt, review, implement, document, or hand off the resource for your business.

Discuss a paid engagement

Call 702-421-1111 or email sales@ezypz.com and mention: Contractor 1099 Readiness Checklist

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