



Cokala Tax Group: Subscription service for tax technical support of Form 1099 and Form 1042 tax reporting and withholding compliance

The core of support service from Cokala is a subscription for continuous, year-round tax technical advisory assistance through question-and-answer exchanges with your Cokala professionals.

This subscription service covers both domestic Form 1099/5498/1098 (and state equivalent) withholding and reporting issues, and also non-U.S. persons issues relating to reporting on Form 1042-S, and also Form W-2 reporting requirements where they affect certain payments.

The support subscription has three parts:

- Custom on-call support
- Weekly bulletins
- Year-end update for tax reporting.

Custom on-call support

A Cokala subscription gives you year-round custom question-and-answer service, with same-day or next-business-day email response to questions you send us; we can also consult with you by phone if needed. The majority of the Q&A exchanges are by email, however, so you have a record of the information.

This service covers the questions that come up about exactly what is reportable, who is the reportable payee, is tax withholding required, documentation on Forms W-9, W-8, or 8233, deposit of withheld amounts and reconciliations on Form 945 or 1042, the year-end 1099, 5498 and 1042-S reporting, and a broad range of related issues for both federal and state regulatory requirements.

There is no quota on the number of questions. Each question receives the personal attention of an experienced Cokala advisor, who prepares an individual response to your specific question.

Weekly bulletins

Your Cokala subscription includes two weekly email bulletins on changes, new developments, and hot issues in both federal and state reporting and withholding compliance. This keeps you up-to-date throughout the year so you can continuously avoid tax liability exposure and not face surprises at year-end reporting time. It also helps you prepare for implementation of changes that are in the works federally or with the states.

Year-end update for tax reporting

Your subscription also includes toll-free telephone and internet connection to a live webcast just for Cokala subscribers, including a question-and-answer session, in the fall of each year to give you an update on changes for federal and state year-end tax reporting. You will have been learning of changes throughout the year in your weekly Cokala news bulletins and your interactions with your Cokala advisors, but the year-end update brings all of the changes together for you and your colleagues to help you plan for an efficient tax season.

COKALA is a tax technical advisory services firm offering you experienced, efficient and practical help in meeting your obligations for tax withholding, payee documentation, tax information reporting, and related issues of federal and state regulatory compliance. We are known for our ability to combine a high level of tax technical knowledge with a practical understanding of tax operations and systems. You will benefit from the responsiveness of a smaller firm, combined with the highest level of expertise, decades of specialized tax experience, and the ability to help you integrate tax regulatory compliance into operational solutions.

Federal and state tax rules are rapidly changing, and enforcement is being stepped up. For practical, experienced, affordable help that will lift you above the risk and confusion, turn to Cokala Tax Group today.



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