

2023 Tax Forms Archival Instructions

Self-Processing Credit Unions



Revised 10/19/2023

Credit Union Name

Contact Name

Phone

IRA and HSA Administration

IRA Administration Self-Administered Third-Party Administered

HSA Administration Self-Administered Third-Party Administered

CD-ROM Copies of Tax Forms & Reports

If you would like CU*Archives to archive your tax forms on CD-ROM, please follow the steps and fill out the options below. Your credit union will need to send the file to CU*Archives; information on how to do so is located in the Year-End Processing guide.

To ship the CDs in a timely manner the CDs will be shipped on two timeframes. Each timeframe will include a different set of data as stated below; **please indicate the # of copies** you would like to receive.

Price: \$50.00 processing fee + \$10.00 per CD-ROM

CD	Item to be Included	Will Be Produced	# of Copies Desired
# 1	1099 and 1098 Tax Forms	No later than March 15, 2024	
# 2	1099/1098 Tax Information Report 5498 Tax Forms 5498 Report(s)	No later than June 4, 2024	

NOTE: If you are interested in displaying tax statements in **It's Me247** Online Banking for your members, or archiving tax statements on your eDOC server, please contact the Imaging Solutions team at imaging@cuanswers.com. *While offering tax forms online for members is a valuable service, we do not recommend using them as a replacement for the CDs, which are a long-term resource for your credit union.*

Complete form and return to Imaging Solutions at imaging@cuanswers.com
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