



1099 Tax Form

How to Access and Download Your Form

January 09, 2024

Why do you need a 1099 tax form?



You will need to download your 1099 tax form if you received a grant through Lendistry in the year 2023. Grant proceeds are taxed, and you will need to report them on your tax returns.¹

How can you retrieve your 1099 tax form?

- 1. Electronically:** Your 2023 tax form is available for immediate download from a secure portal through <https://tax1099.com/edelivery/Login> if you choose to opt-in. This document will provide step-by-step instructions on downloading your 2023 tax form for the grant you received.
- 2. By Mail:** You may also opt out of the electronic delivery method and choose to receive a paper copy, which will be mailed to the business address you provided to Lendistry during the grant application process.

¹Lendistry and its affiliates do not provide tax, legal or accounting advice. This material has been prepared for informational purposes only and is not intended to provide, and should not be relied on for, tax, legal or accounting advice. Readers should consult their own tax, legal and accounting advisors before completing their tax filings.

THERE ARE NO WARRANTIES, EXPRESSED OR IMPLIED, AS TO ACCURACY, COMPLETENESS, OR RESULTS OBTAINED FROM ANY INFORMATION POSTED IN THIS PRESENTATION OR ANY LINKED WEBSITE.

Step 1:

[CLICK HERE](#) to download your 1099 tax form.

If you are experiencing trouble, please contact us at 1099request@lendistry.com.



Email Id*

Email Id * 1

Password *

Password * 2

Don't have OR have forgotten your verification code ?, please enter your credentials above. Use the 'Request Code' button to have the verification code sent to the email address provided by your payer. The email address entered above must match the one on record with your payer.

Request Code

Verification Code *

Verification Code * 3

Log In

A new browser window will open and redirect you to the sign-in page.

- 1. Your Email ID:** Your email ID is the email address where you received the 1099 notice from Lendistry.
- 2. Your Password:** Your password is the first four (4) letters of your first name or company name (excluding spaces and special characters) plus the last four (4) digits of your Social Security Number (SSN) or Employer Identification Number (EIN). See below for examples (do not use these examples to sign in):
 - If your name appears on the form as **Andrew Johnson** with an SSN of **711223456**, then your password would be **andr3456** (first four letters of your first name or business name + last four digits of your SSN/ITIN number).
 - If your business name appears on the form as **A & D** with an ITIN/EIN of **012847934**, then your password would be **ad7934** (first two letters of your business name *without* spaces and special characters + last four digits of your ITIN/EIN number).
 - If your business name appears as **Andrew Johnson PLLC** with an ITIN/EIN of **012847934**, then your password would be **andr7934** (first four letters of your business name + last four digits of your ITIN/EIN number).
 - If your business name appears on the form as **AI & D** with an ITIN/EIN of **517223355**, then your password would be **ald3355** (first three letters of your business name *without* spaces and special characters + last four digits of your ITIN/EIN number).
 - If your name or business name appears on the form as **My Test** with a TIN of **012847934**, then your password would be **myte7934** (first four characters of your first name/business name + last four digits of your SSN/ITIN/EIN).
- 3. Verification Code:** As an enhanced security feature, you will need to request a verification code by using the "Request Code" button. The verification code will be sent to the email address used in the Email Id field and must match the email address where you received the 1099 notice from Lendistry. Please enter the verification code in the box shown and press the Log In button to proceed.

Step 2:

Sign in using your email ID and unique password (see Step 1 on previous page) to opt in or opt out of the electronic delivery of your 1099 tax form.



1. Once signed in, a pop-up window will appear for you to select to opt-in and continue to download your 2023 tax form or select opt-out and exit the window to receive your 2023 tax form in the mail. **We strongly recommend opting in so that you can access your 1099 tax form immediately after it becomes available.**

Consent

Opt-In - I consent to receive my 1099, W2, and/or 1098 electronically for the **Payer : Governors Office of Bus & Economic Dev.**
I understand I can Opt-Out at any time to begin receiving paper forms for subsequent tax years.

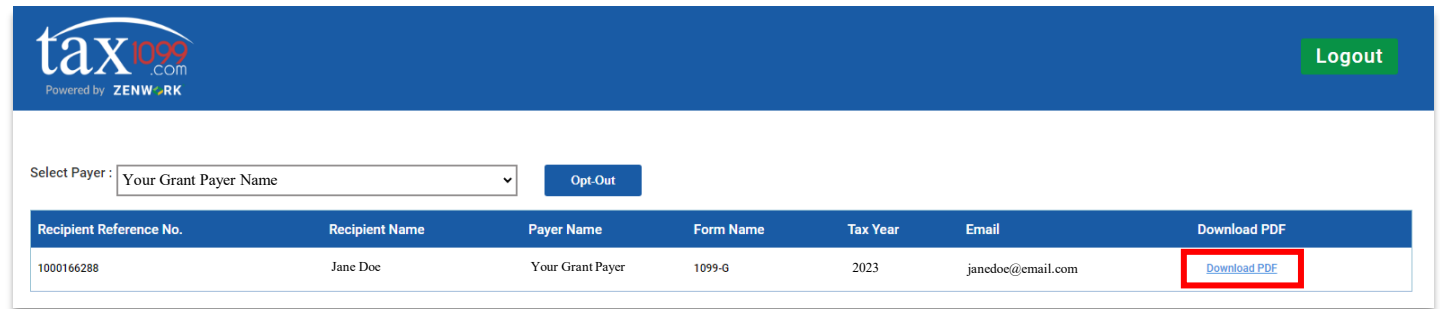
Opt-In & Continue **Opt-Out & Exit**

Click on this to download your 1099 tax form electronically.

Click on this to receive your 1099 tax form by mail.

2. Once select the “Payer” listed in the drop-down menu. There will only be one listed.

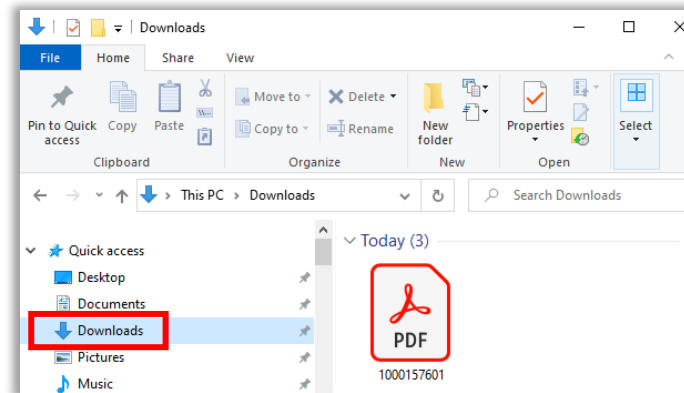
1. Click on the “Download PDF” button to access your 2023 1099 tax form.



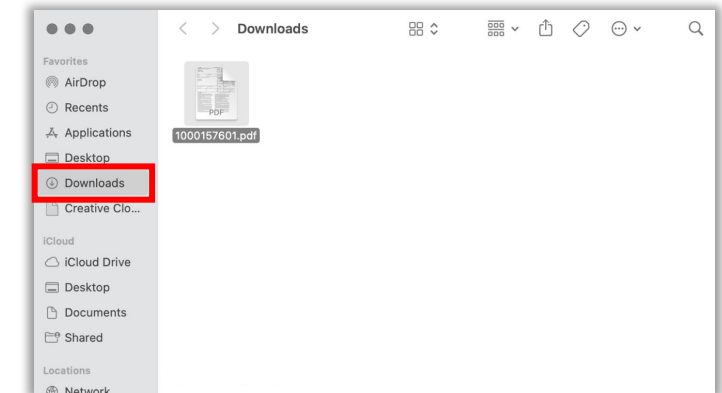
2. Your tax form will be downloaded as a .pdf file and saved to your downloads folder on your local machine. You will need Adobe Acrobat PDF Reader in order to view, download, and/or print your form. Click this [link](#) to download the PDF Reader if you do not have it installed.

Step 3:

Download your 1099 tax form.



Downloads folder on PC



Downloads folder on Mac

Contact Information



For assistance with accessing your 2023 tax form please contact Lendistry's dedicated customer service team at (888) 870-2203 (Monday – Friday, 8:00 a.m.-5:00 p.m. PST) or 1099request@lendistry.com.