

MEMO# 5925

May 27, 1994

JUNE 14 MEETING TO DISCUSS NEW REQUIREMENTS FOR SUBSTITUTE FORMS W-9 AND FORMS 1099

May 27, 1994 TO: TRANSFER AGENT ADVISORY COMMITTEE NO. 25-94 RE: JUNE 14
MEETING TO DISCUSS NEW REQUIREMENTS FOR SUBSTITUTE FORMS W-9 AND FORMS 1099

_____ The Institute has scheduled a meeting to discuss proposed changes to the Substitute Form W-9 and changes to the requirements for substitute statements for Forms 1099, 1098, W@-G. (See Institute Memorandum to Transfer Agent Advisory Committee Members No. 17-94, dated April 28, 1994, dated April 14, 1994.) Attached is a memorandum briefly explaining the issues and information pertaining to the meeting on June 14, 1994 at the Institute offices. If you wish to attend the meeting, please fill out the response form and fax to Shirl Walker, at the Institute, fax number 202/326-5841. Justine Phoenix Director - Operations/ Transfer Agency

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