

Covered Securities

2011

2012

2013

2014

2015

2016

Stock

Dividend Reinvestment Plan

Simple Debt Instruments and Options

Everything Else*

*But Not Gifts or Inheritances...

Why?

Because Broker May Not Know Basis

Applicable check box on Form 8949		OMB No. 1545-0715	
		2018	
		Form 1099-B	
1 a Description of property (Example: 100 sh. XYZ Co.)			
1b Date acquired		1c Date sold or disposed	
1d Proceeds \$		1e Cost or other basis \$	
1f Accrued market discount \$		1g Wash sale loss disallowed \$	
2 Short-term gain or loss <input type="checkbox"/> Long-term gain or loss <input type="checkbox"/> Ordinary <input type="checkbox"/>		3 If checked, basis reported to IRS <input type="checkbox"/>	
4 Federal income tax withheld \$		5 If checked, noncovered security <input type="checkbox"/>	

☐ CORRECTED (if checked)

Applicable check box on Form 8949

OMB No. 1545-0715

2018

Form **1099-B**

1 a Description of property (Example: 100 sh. XYZ Co.)

1b Date acquired

1c Date sold or disposed

1d Proceeds
\$

1e Cost or other basis
\$

1f Accrued market discount
\$

1g Wash sale loss disallowed
\$

2 Short-term gain or loss ☐
Long-term gain or loss ☐
Ordinary ☐

3 If checked, basis reported to IRS ☐

4 Federal income tax withheld
\$

5 If checked, noncovered security ☐

6 Profit or loss on open contracts—12/31/2017

7 Profit or loss on open contracts—12/31/2018

8 Aggregate profit or (loss) on contracts

9 Bartering

Form **1099-B**

(Keep for your records)

www.irs.gov/form1099-B

Department of the Treasury Internal Revenue Service