

FORM 1099-MISC
SCHEDULE OF PAYMENTS TO UNITED STATES CITIZENS AND RESIDENT ALIENS

Conference Name: Marine Imaging Workshop 2024
Chapter/Section Name: IEEE Ocean Engineering Society

Conference Number: 60559
Date of Conference Held (mm/dd/yyyy): 10/7/2024

Conference Acronym: MIW2024
Business/Financial Analyst: W. Kirkwood

Instructions:

- [1] **Due dates** to submit this schedule:
- a) by 7 October of each year for the first 3 quarters payment period. A suggested practice is by the 7th day after the end of each quarter for payments made in the first 9 months of 2016. Example: A 2017 conference made a monetary payment to a US citizen or resident alien in May 15, 2016. By July 7, 2016, a Schedule of Payments form and accompanying Substitute Form W9 must be submitted by email.
- b) at minimum by 7 January of each year for payments made in the 4th quarter of previous year. Example: A 2017 conference made a monetary payment to a US citizen or resident alien in November 15, 2016. By January 7, 2017, a Schedule of Payments form and accompanying Substitute Form W9 must be submitted by email.
- [2] A suggested practice is to gather 1099 information and list it on this form as checks are written. Then at year end only the last few payments have to be listed and the form can be sent in on time.
- [3] All conferences/sections/chapters worldwide are REQUIRED to complete the 1099 Schedule of Payments for any US citizen or resident alien (a.k.a. US persons) who received monetary payments, **except for** expense reimbursements, from the conference checking account during the calendar year. IEEE will then use this schedule to issue 1099 forms, when required, to such individuals. Conferences should have such individuals complete Form W-9 prior to making a payment. Examples: awards, grants, honorariums, prizes, commissions, hourly compensation payments and lump sum payments (do not include expense reimbursements).
- [4] If the conference/section/chapter has not made any payments to US citizens and resident aliens, please enter "**NONE**" on line 1.
- [5] Please complete **ALL** the cells in blue. Please write "N/A" if not applicable. If more than 20 entries are needed then you may use multiple sheets.
- [6] This form must be returned by email in **excel format**. For conferences, please email directly to your IEEE Assigned Business Analyst or to Conference-Finance@ieee.org

Please do not combine different types of payment purpose in one entry. Instead, please separate them in multiple entries by type of payment purpose.

Ref.	Recipient's Name		SSN(XXX-XX-XXXX) for Individual or EIN(XX-XXXXXXX) for Business Entity	Recipient's Mailing Address					Total Amount of Payment in USD	Purpose of Payments (e.g. awards, student grants, honorariums, prizes, commission, hourly	Calendar Year Payment Was Made
	Last Name or Business Entity Name	First Name		Street Address (including apt. no.)	City or Town	State or Province	Zip or Postal Code	Country			
1	Fields	Jamie	532-39-6414	6744 Carolina Street	Anacortes	WA	98221	USA	500.00	Award for best image	10/10/24
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Certification:

To the best of my knowledge and belief, this schedule is true, correct and complete. I understand that IEEE will issue IRS Form 1099 and/or Form W-2 tax statements when required. Any questions please contact Conference Services at conference-finance@ieee.

William Kirkwood
Treasurer's Name (Print)

kiwi@mbari.org
Email Address

4/7/25
Date (mm/dd/yyyy)


Signature (not required when sent by email)

FORM 1042
SCHEDULE OF PAYMENTS TO NONRESIDENT ALIENS IN THE UNITED STATES

Conference Name: _____ Conference Number: _____ Conference Acronym: _____ Section/Chapter Name: _____
City and Country of Conference Held: _____ Date of Conference Held (mm/dd/yyyy): _____ Business/Financial Analyst: _____

Instructions:

- [1] **Due dates** to submit this schedule:
- a) by 7 October of each year for the first 3 quarters payment period. A suggested practice is by the 7th day after the end of each quarter for payments made in the first 9 months of 2016. Example: A 2017 conference made a monetary payment to a Non-US Resident Alien individual in May 15, 2016 for services/activities performed in the United States. By July 7, 2016, a Schedule of Payments form and accompanying Substitute Form W8 must be submitted by email.
- b) at minimum by the 7 January of each year for payments made in the 4th quarter of previous year. Example: A 2017 conference made a monetary payment to a Non-US Resident Alien individual in November 15, 2016 for services/activities performed in the United States. By January 7, 2016, a Schedule of Payments form and accompanying Substitute Form W8 must be submitted by email.
- [2] All conferences/sections/chapters that take place within the United States are **REQUIRED** to complete the 1042 Schedule of Payments for any Non-US citizen or Non-US resident alien (a.k.a non-US person) who received monetary payments for services or activities performed at the conference in the United States, except for expense reimbursements, from the conference checking account during the calendar year. IEEE will then use this schedule to issue 1042 Forms, when required, to the U.S. Internal Revenue Service (IRS) and to recipients of these payments. Conferences should have such individuals complete Form W-8 prior to making payment. Examples include any payments made when services or activities were performed at the US conference: awards, grants, honorariums, prizes, commission payments, hourly compensation payments and lump sum payments (do not include expense reimbursements). If a US Conference payment is made for services or activities performed outside the United States, do not include them on this form.
- [3] If the conference/chapter/section has not made any payments to Non-US Resident aliens, please enter "**NONE**" on line 1.
- [4] Please complete **ALL** the cells in blue. Please write "N/A" if not applicable. If more than 20 entries are needed then you may use multiple sheets.
- [5] This form must be returned by email in **excel format**. For conferences, please email directly to your IEEE Assigned Business Analyst or to Conference-Finance@ieee.org

Please do not combine different types of payment purpose in one entry. Instead, please separate them in multiple entries by type of payment purpose.

Ref.	Recipient's Name		Recipient's U.S. TIN, if any	Recipient's Mailing Address					Date & Year Payment Was Made (mm/dd/yyyy)	Total Amount of Payment in USD	Purpose of Payments (e.g. awards, student grants, honorariums, prizes, commission, hourly compensation, ...)	Country Where Activities / Services Were Performed
	Last Name	First Name		Street Address (including apt. no.)	City or Town	State or Province	Zip or Foreign Postal Code	Country				
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Certification:

To the best of my knowledge and belief, this schedule is true, correct and complete. I understand that IEEE may request U.S. IRS tax forms be prepared when required. Any questions please contact Conference Services at conference-finance@ieee.org.

Treasurer's Name (Print)

Email Address

Date (mm/dd/yyyy)

Signature (not required when sent by email)