



FATCA-related IRS Forms and Instructions

The table below lists the status of FATCA-related forms and instructions. Links are included when available.

Purpose	Form w/ link	Title	Form Status
Reporting	Form 8938 • Instructions	Statement of Specified Foreign Financial Assets	Final 2014-12-12
Reporting	2014 Form 1042 • Instructions • Update to instructions	Annual Withholding Tax Return for U.S. Source Income of Foreign Persons	Final 2014-03-21
Reporting	2014 Form 1042-S • Instructions	Foreign Person's U.S. Source Income Subject to Withholding	Final 2014-12-22
Reporting	2015 Form 1042-S • Instructions	Foreign Person's U.S. Source Income Subject to Withholding	Final 2014-12-18
Reporting	2014 Form 1042-T (includes instructions)	Annual Summary and Transmittal of Forms 1042-S	Final 2014-05-12
Reporting	2015 1099-R • Instructions	Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.	Final 2014-10-22
Reporting	2014 1099-DIV • Instructions • Update to instructions	Dividends and Distributions	Final 2015-6-01
Reporting	2014 1099-INT • Instructions • Update to instructions	Interest Income	Final 2014-10-22
Reporting	2014 1099-MISC • Instructions • Update to instructions	Miscellaneous Income	Final 2014-10-22
Reporting	2014 1099-OID • Instructions • Update to instructions	Original Issue Discount	Final 2014-10-22
Reporting	2015 1099-DIV • Instructions	Dividends and Distributions	Final 2014-10-21
Reporting	2015 1099-INT • Instructions	Interest Income	Final 2014-10-21
Reporting	2015 1099-MISC • Instructions	Miscellaneous Income	Final 2014-10-21
Reporting	2015 1099-OID • Instructions	Original Issue Discount	Final 2014-10-21
Reporting	2014 Form 8966 • Instructions • Update to instructions	Foreign Account Tax Compliance Act (FATCA) Report	Final 2014-03-05
Registration	Form 8957 • Instructions	Foreign Account Tax Compliance Act (FATCA) Registration	Final 2013-08-18
Withholding Certificate	Instructions for the Requester of Forms W-8 • Update to instructions	Instructions for the Requester of Forms W-8	Final 2014-07-25
Withholding Certificate	Form W-8BEN • Instructions	Certificate of Foreign Status of Beneficial Owner for United States Tax Withholding and Reporting (Individuals)	Final 2014-03-03
Withholding Certificate	Form W-8BEN-E • Instructions • Update to instructions	Certificate of Status of Beneficial Owner for United States Tax Withholding and Reporting (Entities)	Final 2014-07-03
Withholding Certificate	Form W-8ECI • Instructions	Certificate of Foreign Person's Claim That Income Is Effectively Connected With the Conduct of a Trade or Business in the United States	Final 2014-07-03
Withholding Certificate	Form W-8EXP • Instructions	Certificate of Foreign Government or Other Foreign Organization for United States Tax Withholding	Final 2014-07-03

Withholding Certificate	Form W-8IMY • Instructions	Certificate of Foreign Intermediary, Foreign Flow-Through Entity, or Certain U.S. Branches for United States Tax Withholding and Reporting	Final 2014-07-03
Withholding Certificate	Instructions for the Requester of Form W-9	Instructions for the Requester of Form W-9	Final 2014-12-24
Withholding Certificate	Form W-9 (includes instructions)	Request for Taxpayer Identification Number and Certification	Final 2014-12-18
Withholding Certificate	Form W-9 (SP) (includes instructions)	Solicitud y Certificación del Número de Identificación del Contribuyente	Final 2013-09-30