

Subject: Important: Information Needed for 1094B & 1095B Filing – Please Respond by February 20, 2025

Attachments:

 [1094/1095-B Collection Form](#)

 [Additional Collection Workbook Instructions](#)

Dear [Client's Name],

We're reaching out on behalf of your agent to assist with your 1094B & 1095B filing. To ensure everything is completed on time, please review the following instructions carefully and return the completed **Excel spreadsheet** by **February 20, 2025**.

Why It's Important to Submit Early The official deadline for submitting the completed spreadsheet is February 20, 2025, but we encourage you to send it as soon as possible to allow time for processing and to ensure we meet compliance deadlines.

Steps to Complete Your Filing:

1. Review the Attached Instructions

- **Additional Instructions for the Spreadsheet:** For guidance on how to complete each section of the Excel spreadsheet, please refer to the attached document titled "[Additional Collection Workbook Instructions]." This will walk you through each field to minimize confusion and ensure accuracy.
- **Accessing Data to Complete the Spreadsheet:**
- **QuickBooks or Payroll System (Recommended):** You may find that the fastest way to gather the necessary information is through your payroll system or QuickBooks.

2. Complete the Excel Spreadsheet

- **Attached Spreadsheet:** We have attached the required Excel spreadsheet for your completion. Please enter all necessary data as directed in the workbook as well as the additional instructions that are attached.

3. Return the Spreadsheet by February 20, 2025

- Once completed, please return the spreadsheet to us via email to compliance@ociservices.com.

Fee Information The cost per form, if data is provided before February 20th, is \$10 per form. Data submitted after February 20th is a \$25 additional flat fee. For an additional \$1.50 per form, 1095s can be mailed if the spreadsheet is completed and sent to us before February 20th.

Thank you for your cooperation. If you have any questions, please feel free to reach out to compliance@ociservices.com.

Thank you,

OCI Insurance & Financial Services