

## **1099 - Partners**

Alger Funds  
AllianceBernstein (Alliance Capital)  
American Beacon (former American AAdvantage Funds)  
American Century Brokerage  
American Century Investments  
American Funds (AFS)  
Ameriprise Financial  
Apex Clearing  
ArcBest  
Ariel Mutual Funds  
Armada Funds  
Artisan  
AssetMark Trust Company  
AXA Advisors, LLC  
Baron Funds  
BB&T Securities (formerly Clearview Correspondents Servi  
Bear Stearns/J.P. Morgan Clearing Corp  
Bear Stearns/J.P. Morgan Securities  
Betterment  
BNY Mellon  
BNYM CMAA  
BNYMellonAS  
Buffalo Funds  
Charles Schwab & Co., Inc.  
Chase Investment Services Corp  
Citi Personal Investments International  
Citi Personal Wealth Management  
Citi Private Bank  
Citibank.com (Investment Accounts Only)  
Columbia Management  
Commonwealth Equity Services-Investor360  
Compass Brokerage  
COR Clearing  
Credit Suisse Securities (USA) LLC  
CRI Securities, LLC.  
CUNA Brokerage Services, Inc.  
D.A. Davidson & Co.  
Davenport & Company LLC  
Davis Funds

Delta Community Credit Union  
Deutsche Bank Alex brown  
Dodge and Cox  
DWS Investments  
E\*TRADE Securities  
Eagle Family of Funds  
Edward Jones  
Federated Investors  
Fidelity Investments  
First Clearing, LLC  
First Command Financial Planning  
First Eagle Funds  
First Republic Securities Company, LLC  
FirstSouthwest Company  
Franklin Templeton Investments  
Gabelli Funds  
GainsKeeper  
Guggenheim Investments  
Harbor Funds  
Harrisdirect  
Hartford Mutual Funds, The  
Hefren-Tillotson, Inc.  
Hilliard Lyons  
Homestead Funds  
Infinisource-1099  
Invesco  
Investment Center  
Investors Tax Information Processing Services  
Ivy Funds  
J.P. Morgan Private Banking  
Janney Montgomery Scott LLC  
Janney Montgomery Scott LLC/1099 (not R)  
Janus  
John Hancock Funds  
JPMorgan Funds  
Lincoln Investment Planning, Inc.  
Loomis Sayles Funds  
Lord Abbett  
LPL  
Madison Funds (formerly Members)

MainStay  
Merrill Lynch  
MFS Investment Management  
Morgan Keegan & Company  
Morgan Stanley Benefit Access  
Morgan Stanley Wealth Management  
National Financial(Fidelity)  
Natixis Advisor Funds  
NetExchange Client  
NMIS, LLC  
Oakmark Funds  
Oppenheimer & Co. Inc.  
OppenheimerFunds Inc  
Pershing Advisor Solutions  
PIMCO  
Pioneer Investments  
Qforce  
Raymond James  
Raymond James Bank  
RBC Wealth  
Regal Securities  
Robert W. Baird & Co. (1099 statements)  
RS Investments  
Schedule K-1.com  
Scivantage  
Scottrade Bank  
Scottrade, Inc.  
Securian Financial Services, Inc  
Selected Funds  
Sentinel Funds  
Sharebuilder/IngDirect  
Southwest Securities  
Stanford Group Company  
Sterne Agee  
Stifel Nicolaus  
Stockcross Financial  
T. Rowe Price Brokerage  
T. Rowe Price Mutual Fund Accounts  
TD Ameritrade  
Technology Credit Union

The Royce Funds  
Thrivent Mutual Funds  
TIAA-CREF Brokerage  
Trust Company of America  
U S Bancorp Investments  
UBS Financial Services Inc.  
USAA  
Vanguard Group - Brokerage Account  
Vanguard Group - Mutual Fund Accounts  
Waddell & Reed  
Wall Street Concepts/Sungard  
Weitz Funds  
Wells Fargo Advantage Funds  
Wells Fargo Advisors  
William Blair Funds  
WM Group of Funds (Principal)

## **W2 Partners**

ADP

Alexis Industrial

Allstate Federal Savings Bank

Allstate Insurance Company

Allstate New Jersey Insurance Co.

AstraZeneca

Avaya

Ceridian - SeeMyW2

Ceridian/ereports

DDI-Digital Designs

Drexel University & Drexel College of Medicine

e-PRINTVIEW

Emory University and Emory Healthcare

Eye Surgery, Inc.

Fidelity Investments - NetBenefits

Getmyw2.com-CIC Plus/PaperlessEmployee.com

Guidant

Heartland Employment Services, Inc.

Infinisource-W2

Intuit Online Payroll

Kiewit Construction Group, Inc.

Kraft U.S.

Kroger

Maumee Urgent Medical Care Center

Michiana Eye Center

National Finance Center

National Science Foundation

NetSpend

Online Payroll (IntuitOnlinePayrollWhiteLabel)

PaperlessPayCorp.com

Pomerantz Staffing Services LLC

Qforce-W2

Social Security Administration

St. Paul Fire & Marine Insurance Co.

Staples and Subsidiaries

Sun Healthcare

The Ohio State University

TriNet

Ultimate Software - A

Ultimate Software - P  
Ultimate Software - W  
University of California, San Diego  
Verizon  
WAL-MART Associates, INC  
Wells Fargo Payroll  
Westaff (USA), Inc.  
Yellow