

2017 Tax Statement and Notification Schedule

We will send a notification to your Message Center when tax documents are posted to the Tax Center.

Subject	Date	Additional Information
2017 IRS Form 1099-R (All IRAs)	No later than 1.31.18	IRS Form 1099-R shows reportable IRA distributions. <i>Review any IRA distributions, Roth IRA conversions or recharacterizations, and Rollover IRA distributions, as well as federal and state tax withholdings, that have been requested in 2017 and alert us of any discrepancies as soon as possible.</i>
2017 Consolidated IRS Forms 1099 and 8949 as well as OFX, .txf, and .csv downloads	No later than 2.28.18	Consolidated IRS Form 1099 shows capital gains, interest, dividends and other taxable amounts. IRS Form 8949 (Sales and Other Dispositions of Capital Assets) shows capital gains and losses. OFX interface allows 1099 data to be imported into popular tax reporting software such as TurboTax and H&R Block. .txf files contain realized gains and losses for upload into tax preparation software. Gain/Loss Report spreadsheets (.csv files) are available for download year-round, and may also be useful in preparing taxes. <i>Note: Corrections to IRS Form 1099 are issued when companies reclassify distributions from the prior year. Reclassifications and the associated corrections to IRS Form 1099, Form 8949, .txf downloads and gain loss reports are typically completed by the end of March, but may be posted at any time. We have no control over reclassifications or their timing.</i>
2017 IRS Form 5498 (All IRAs)	No later than 5.31.18	IRS Form 5498 shows reportable IRA contributions and your year-end 2017 Fair Market Value (FMV) <i>Review any IRA contributions, Roth IRA conversions or recharacterizations, and Rollover IRA contributions that have been requested in 2017 and alert us of any discrepancies as soon as possible.</i>