

Tax Form Mailing Calendar

Last updated November, 2018.

All forms are mailed within five business days of the Activates Online dates, which are subject to change.

Original Tax Form	Description	Activates Online	Eligible for eDelivery?
5498	Contributions and year-end market values for retirement accounts.	01/18/2019	Yes
1099-R	Distributions from retirement accounts.	01/18/2019	Yes
1099-Q (For broker-dealers only)	Distributions from 530 Coverdell educational savings accounts.	01/09/2019	Yes
1099: 1st Mailing (POP 1)	Brokerage accounts with holdings whose income does not require reclassification or additional information from issuers. Generally, this includes accounts holding options, certain equities, and fixed income securities.	01/26/2019	Yes
1099: 2nd Mailing (POP 2)	Might include equities and fixed income securities, closed-end funds and non-Fidelity mutual funds where the issuer provided final tax information after the first mailing.	02/16/2019	Yes
1099: INFO only (corporate)*	Supplemental tax reporting information for corporate and eligible exempt accounts. The details are not reported to the IRS.	02/16/2019	Yes
1099: Preliminary Tax Statement	Provides a 'point in time' snapshot of reporting activity for customers slated for a later mailing. Includes a symbol/CUSIP for the list of positions which are lacking final tax information.	02/16/2019	No
1099: 3rd Mailing (POP 3)	Might include brokerage accounts holding Unit Investment Trusts (UITs) and Real Estate Investment Trusts (REITs).	03/02/2019	Yes
1042-S (Nonretirement)	Brokerage accounts held by Nonresident Aliens (NRA). The form reports all U.S. source income distributions and NRA taxes withheld.	03/01/2019	No
1042-S (Retirement)	Brokerage retirement accounts held by Nonresident Aliens (NRA). The form reports retirement distributions and NRA taxes withheld.	Not available online; mails on 03/15/2019	No
1099: 4th Mailing (POP 4)	Might include brokerage accounts holding Unit Investment Trusts (UITs) and Real Estate Investment Trusts (REITs) in which final tax information was delayed from the issuer. Also includes Mortgage-Backed Securities (MBS) in which final tax information from the issuer has been received.	03/08/2019	Yes
592-B	Reports state tax withheld for residents of California.	01/19/2019	Yes

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2439	Undistributed long-term capital gains from a regulated investment company and taxes paid by the mutual fund.	03/09/2019	No
5500 AVS	Keogh Money Purchase and Profit Sharing Plans Annual Valuation Statement.	04/20/2019	No
5498 (Spring)	Retirement account year-end market values and prior year contributions made between January 1 – April 15 of the following tax year.	05/08/2019	Yes
5498-ESA (Coverdell) (For broker-dealers only)	Contributions to education savings plans.	04/20/2019	Yes
480.6A	Reports U.S. domestic taxable income, Puerto Rico (PR) taxable income without PR (foreign) source withholding, and all gross proceeds paid to PR residents.	02/26/2019	No
480.6B	Reports PR residents with PR source withholding for PR securities.	02/26/2019	No
480.6C	Reports Non-PR residents with PR source withholding for PR securities.	02/26/2019	No
480.6D	Reports PR source income, from PR debt instruments and dividend income, as reported on form 480.6B.	02/26/2019	No

* An optional service that requires opting into by the branch or super-branch; see the Tax Form Eligibility Matrix for a list of available registrations. For all other INFO ONLY requests, please see the Tax Form Correction Calendar for ad hoc INFO 1099 availability.