

2022 Tax Form Mailing Dates

Our partner, National Financial Services (NFS), will post and mail consolidated 1099 tax forms in four waves, outlined in the table below. The dates below are when your tax form will be available in Investor360°. They will be mailed five to seven days after they are posted online.

Tax Forms	Description	Available Online (on or before)
Retirement Tax Forms 5498	Year-end market values of contributions to retirement accounts	January 21, 2022
Retirement Tax Forms 1099-R	Distributions from retirement accounts	January 21, 2022
Consolidated 1099s: First Mailing	Non-retirement accounts with holdings whose income doesn't require reclassification or additional information from issuers (Generally, this includes accounts holding options, certain equities, and fixed income securities.)	January 22, 2022
Consolidated 1099s: Second Mailing	Equities and fixed income securities, closed-end funds, and non-Fidelity mutual funds where issuer provided final tax information after first mailing; second mailing includes information-only 1099s issued for exempt accounts, including nonprototype and corporate accounts	February 12, 2022
1099: Info-Only (Corporate and Nonprototype Accounts)	Supplemental tax reporting information for corporate and eligible exempt accounts; details aren't reported to IRS	February 12, 2022
1099: Preliminary Tax Statements	Point-in-time snapshot of reporting activity for customers slated for a later mailing; includes symbols/CUSIPs for positions that lack final tax information as of February 15, 2022 (This is online only, is not reported to the IRS, and should not be used for tax reporting purposes.)	February 12, 2022 (online only)
Consolidated 1099s: Third Mailing	Accounts holding unit investment and real estate investment trusts (UITs and REITs)	February 26, 2022
Consolidated 1099s: Fourth Mailing	Accounts holding UITs and REITs for which final tax information was delayed from issuer and mortgage-backed securities for which final tax information has been received from issuer	March 5, 2022

Please note: In instances when tax reporting for an account occurs during the extension period, NFS will provide an **online preliminary tax statement starting on February 12**. This is viewable only in Investor360° and will provide a single view of current tax information to help you determine early tax liability.