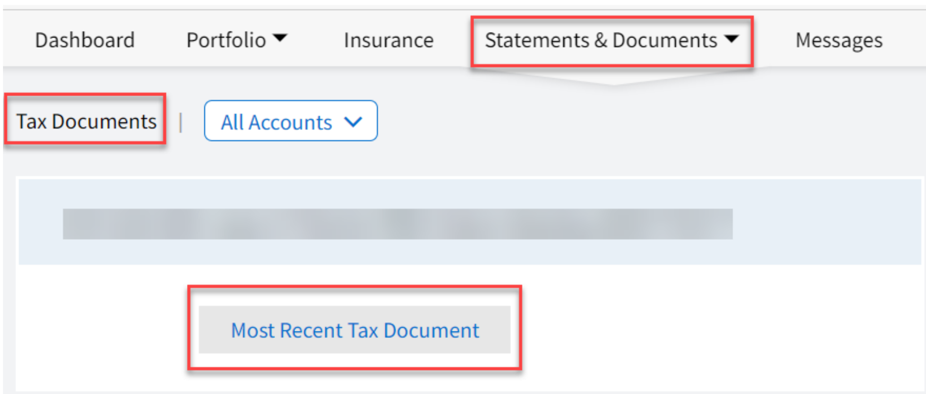
Subject: Your Tax Form Will Arrive Soon

Tax documents for your accounts will begin generating in mid-January.

Accessing Your Tax Form
If you are enrolled in e-notification, you will receive an email notifying you that your tax forms are ready to view. **If you are *not* enrolled in e-notification**, your form will be mailed within five business days of online posting.

In both cases, once issued, you may access an electronic version of your tax forms (see screenshot below) in Investor360°® under **Statements & Documents > Tax Documents > Most Recent Tax Document**.



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)
1099-Q (529 accounts)	Distributions from college savings accounts.	January 10, 2025
Retirement Tax Forms 1099-R	Distributions from retirement accounts	January 17, 2025
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 25, 2025

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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 8, 2025
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, 2023 (This is online only, is not reported to the IRS, and should not be used for tax reporting purposes.)	February 11, 2025 (online only)
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, 2025
Consolidated 1099s: Third Mailing	Accounts holding unit investment and real estate investment trusts (UITs and REITs)	February 22, 2025
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 issue	March 7, 2025
Retirement Tax Forms 5498	Year-end market values of contributions to retirement accounts	May 16, 2025

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 11**. This is viewable only in Investor360° and will provide a single view of current tax information to help you determine early tax liability.

If you have questions, please don't hesitate to call our office at 703.891.9960.