

## Custodian Tax Reports - Mailing Schedule

Our recommended custodians have provided us with the following estimated mailing dates for your 1099s and related documents. Please note that the dates are estimates and that actual mailing dates may vary. In addition, custodians may send corrected form 1099s, which should be forwarded to your tax preparer upon receipt.

### **Charles Schwab:**

- 1099 1<sup>st</sup> Mailing: January 31 – February 9, 2019
- 1099 2<sup>nd</sup> Mailing: February 14 – February 23, 2019

### **TD Ameritrade Institutional:**

- 1099 1<sup>st</sup> Mailing: January 18, 2019
- 1099 2<sup>nd</sup> Mailing: February 7, 2019
- 1099 3<sup>rd</sup> Mailing: February 13, 2019

### **Fidelity Investments:**

- 1099-R: January 18, 2019
- 1099 1<sup>st</sup> Mailing: January 26, 2019
- 1099 2<sup>nd</sup> Mailing: February 16, 2019
- 1099 3<sup>rd</sup> Mailing: March 2, 2019

### **National Advisors Trust Company:**

- 1099-R: January 31, 2019
- 1099 1<sup>st</sup> Mailing: February 15, 2019
- 1099 2<sup>nd</sup> Mailing: March 15, 2019

Please do not hesitate to reach out to your wealth manager if you have any questions.