

2015 Form 5498 Mailing Notice

Forms 5498 for the 2015 tax year will be mailed to account owners May 31, 2016. The information on Form 5498 is submitted to the Internal Revenue Service to report contributions, including any catch-up contributions, notice of a 2016 Required Minimum Distribution (RMD), the Fair Market Value (FMV) of Individual Retirement Accounts and other Form 5498 reportable activity.

Boxes 12a, (RMD date) and 12b (RMD amount) will not be populated since we previously mailed this information to the account owner in January 2016.

Online Access – 2015 Forms 5498 will be available on TCAdvisor and Liberty under Tax Information and Tax Forms respectively on May 31, 2016.

Note:

If there were no 2015 contributions or related events, account owners will not receive a 2015 Form 5498. The 2015 Fair Market Value reported on the year-end statement will be provided to the IRS.

If you have any questions regarding this notice, please contact your relationship manager.