

Tax form schedule for 2021 tax filing



Form	Mailing Schedule	Explanation of Form
Year-End Statement	Early January	Reports distributions and activity in each account for the year, including any tax-free income and year-end balances for IRA accounts.
Combined Tax Package for Form 1099-DIV, 1099-B	February 15	Taxable activity for accounts. Form 1099-DIV reports distributions and exempt interest dividends. Form 1099-B reports proceeds from sales or exchanges, along with total costs and total gain or loss on shares sold (when available).
Form 1099-R	January 31	Form 1099-R reports withdrawals and distributions from retirement accounts.
Online Tax Aid	February 15	Tax data imports available for TurboTax and H&R Block software.
K-1s	Mid-April	K-1 forms are sent directly by the limited partnership. If you own limited partnership units, please contact the company directly for information.
Form 5498	May 30	Reports contributions and rollovers to Traditional and Roth IRAs, SEP-IRAs, and SIMPLE IRAs.

Investment Products: Not FDIC Insured - No Bank Guarantee - May Lose Value.

Axos Advisor Services is a trademark of Axos Clearing LLC. Axos Clearing LLC provides back-office services for registered investment advisers. Neither Axos Advisor Services nor Axos Clearing LLC provides investment advice or make investment recommendations in any capacity.

Securities products are offered by Axos Clearing LLC, Member FINRA & SIPC.

Axos Clearing, LLC does not provide legal, accounting, or tax advice. Always consult your own legal, accounting, and tax advisors.

© 2021 Axos Clearing LLC. Member FINRA & SIPC. All Rights Reserved.