

**2021 Form 5498 Mailing
Notice**



Form 5498 for the 2021 tax year will be mailed to account owners no later than May 31, 2022. The information on Form 5498 is submitted to the IRS to report contributions, including any catch-up contributions, notice of a 2021 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 RMD notifications were mailed to clients of RMD age in January 2022.

Online Access: 2021 Forms 5498 will be available on Liberty under “Tax Information” and “Tax Forms” respectively by May 31, 2022. Applicable RMD Notices are also viewable in this section.

If there were no 2021 contributions or other reportable activity in an account, account owners will not receive a 2021 Form 5498. The 2021 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 client service advocate.

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

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