



## 2019 Form 5498 Mailing Notice

IRS Notice 2020-23 extends the deadline for deposits into retirement accounts through July 15, 2020, for various forms including Form 5498. E\*TRADE Advisor Services will send forms no later than August 31, 2020.

The information on Form 5498 is submitted to the IRS to report contributions, including any catch-up contributions, notice of a 2020 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 2020.

**Online Access:** 2019 Forms 5498 will be available on Liberty under “Tax Information” and “Tax Forms” respectively around the time of mailing. Applicable RMD Notices are also viewable in this section.

If there were no 2019 contributions or other reportable activity in an account, account owners will not receive a 2019 Form 5498. The 2019 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.