2022 Forms 1099-R and required minimum distribution (RMD) mailing reminder notice



As a reminder:

2022 Forms 1099-R will be mailed by and available online on January 31, 2023.

Letters for account owners requiring RMDs will be mailed by January 31, 2023.

Please let your Client Service Advocate know if you have questions.

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

Axos Advisor Services is a trade name 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.