

Important information for 2022 tax planning



It's time to get ready for the 2022 tax season. Here's the information you'll need to know about tax forms and the tax mailing schedule from Axos Advisor Services to help you plan for the tax season.

Tax information statements

Clients' tax information statements, which includes 1099 forms, will be delivered as early as possible. Axos Advisor Services will begin mailing 1099 tax statements by January 31, 2023.

A timeline for the delivery of the 2022 forms accompanies this document.

- If filing via TurboTax or H&R Block, your client must look up Axos Advisor Services to retrieve their complete account data for 2022.
 - The same Liberty login will be used.
- One RMD (required minimum distribution) notice will be sent by Axos Advisor Services in January for any applicable accounts.

Timeline for corrected forms

Corrected 1099s will be issued as needed.

Year-end deadline for IRA distributions

This year, to ensure year-end deadlines are met, we are requesting that investors submit online withdrawal requests by December 17, 2022. If the IRA withdrawal impacts the investor's taxes and/or is intended to satisfy the investor's RMD for the current year, please note the following:

- The investor's IRA account must have sufficient settled cash to cover the distribution.
- Please allow for adequate processing time and submit the online request in good order by December 17, 2022.
- For all Distribution requests submitted after December 17, 2022, best efforts will be made to complete the request by December 30, 2022.
- If investors are requesting a distribution after December 17, 2022, please contact your Client Service Advocate to determine the best way to process the IRA distribution to satisfy applicable deadlines.

If you have any questions about the 2022 tax information, please contact your Client Service Advocate.

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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	Feb 15th	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 31st	Form 1099-R reports withdrawals from retirement accounts. Reports distributions.
Online Tax Aid	Feb 15th	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.

**Please be aware that some issuers do not make their final distribution information available until after January.*

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