

# TAX YEAR 2018 MAILING SCHEDULE AND INFORMATION

In an effort to deliver the highest quality service, listed below is the 2018 tax year mailing schedule. Please visit [www.janney.com/taxes](http://www.janney.com/taxes) for the most current tax-related updates and information.

Mailing Deadline	Mailing Type	Description of Contents
January 31, 2019	Forms 1099-R and 1099-Q	Distributions from your IRA, Qualified Plan, or Education Savings Account.
February 15, 2019*	Form 1099Consolidated	Includes 1099-INT, 1099-DIV, 1099-B, 1099-MISC, AND 1099-OID (other than CMO/REMIC).
N/A expected online February 15, 2019	Preliminary Tax Statements (Not an official tax statement)	Includes all 1099Consolidated information with additional page containing holdings that have not yet finalized their taxability by February.
March 15, 2019	Form 1099-OID (REMIC)/ WHFIT Statement for Mortgage Securities	OID and Interest Accruals from CMOs/REMICs. Income and Expenses Resulting from Pooled Mortgage Securities.
	1042-S	Foreign Person's U.S. Source Income Subject to Withholding.
	Schedule K-1	Master Limited Partnership (MLP) Income, which will be mailed directly from the General Partner (not provided by Janney).
April 30, 2019	Form 5498-ESA	Reports contributions (including rollover contributions) to Coverdell ESAs.
May 31, 2019	Form 5498	Reports contributions (including rollover contributions) to any individual retirement arrangement (IRA), including a SEP, SIMPLE, and Roth IRA; Roth conversions; IRA recharacterizations; and the fair market value (FMV) of the account.

\*The IRS changed the deadline for delivering most IRS 1099Consolidated Forms from January 31 to February 15. As in the past, we expect to receive a 30-day extension from the IRS to March 15, 2019 based on this year's February 15, 2019 deadline.

Each taxpayer's situation is different and tax-related information provided herein is general in nature. Clients should consult with a professional tax advisor with questions specific to their personal tax situation.

