

TAX MAILING SCHEDULE



Knowing when you'll be able to access information you need to prepare your taxes makes the process easier. **Here's the mailing schedule to help you plan.**

Mailing Deadline	Documents	Description of Contents
January 31st	Forms 1099-R and 1099-Q	Distributions from your IRA, Qualified Plan or Education Savings Account
February 15th*	Form 1099 Consolidated	Includes 1099-INT, 1099-DIV, 1099-B, 1099-MISC, AND 1099-OID (other than CMO/REMIC)
N/A Expected online February 15th	Preliminary Tax Statements <i>(Not an official tax statement)</i>	Includes all 1099 Consolidated information with an additional page containing holdings that have not yet finalized their taxability by February
March 15th	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 <i>(Not provided by Janney)</i>
April 30th	Form 5498-ESA	Reports contributions (including rollover contributions) to Coverdell ESAs
May 31st	Form 5498	Reports contributions (including rollover contributions) to any individual retirement arrangement (IRA), including a SEP, SIMPLE, and Roth IRA; Roth conversions; IRA re-characterizations; and the fair market value (FMV) of the account.

If the mailing deadline falls on a weekend or holiday, the IRS generally extends the regulatory date to the immediate business day following.

*The IRS changed the deadline for delivering the 1099-Consolidated Forms from January 31st to February 15th. As in the past, we expect to receive a 30-day extension from the IRS to March 15th.

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