

Tax Documents: planning for your 2018 taxes

We understand receiving your tax information in a timely manner is important to you. To assist you in planning for your 2018 taxes, we have produced the following schedule of various tax forms that may be mailed to you over the next several months depending on the type of account(s) you have. You will receive only those forms that are appropriate for the activity in each of your accounts. In the event you have income or distributions from securities where the final tax information was not made available to our firm at the time of the original mailing of your tax document, we will send you an amended version as soon as that information is provided. Please ensure you have received required tax forms for all of your accounts that may have taxable activity before completing your tax return.

Online access of tax documents

All tax documents will be available online. For information on how to view your documents online and suppress paper copies, please contact your financial professional. With your permission, your tax preparer may also gain online access to your tax documents. Speak with your Financial Advisor about setting up an agreement for third-party access.

Note: The IRS no longer requires financial institutions to provide clients amended 1099s for amounts where the change in any box is \$100 or less. If you would like to receive amended 1099s for corrections less than \$100, please contact your Financial Advisor.

Mailing Schedule for the 2018 Tax Season

Tax Documents	Mailed on or before IRS Mailing Deadline	Description of Contents
Consolidated Statement & Form 1099-DIV Form 1099- INT Form 1099-OID Form 1099-B Form 1099-MISC Form 1099-C Form 1099-OID (REMIC) Form 1099-B/Form 1099-INT (WHMT)	February 15, 2019 In some instances, you may receive an amended version for your account when additional income or distribution information was provided after the original mailing deadline.	Information is provided on the following: <ul style="list-style-type: none">• Dividends and other distributions• Reportable interest income• Original issue discount income (other than CMO/REMIC instruments)• Proceeds of sales, redemptions and tenders• Royalties, substitute payments and miscellaneous income• Cancellation of debt OID and interest accruals from CMOs/ REMICs• Widely Held Mortgage Trust receipt-based reporting on mortgage pools

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Market Value and RMD Information (Form 5498)	January 31, 2019	Included in the December 2018 account statement. This shows the value of the account as of the last business day of the year and information regarding your Required Minimum Distribution (RMD), if applicable.
Form 5498-ESA	April 30, 2019	In most cases, this information will accompany your December 2018 statement and reports contributions, rollovers and direct transfers to your Coverdell Education Savings Accounts. Amended information will be sent by the given date for accounts that have made 2018 contributions after the last day of December 2018 but before or on April 15, 2019.
Form 5498	May 31, 2019	In most cases, this information will accompany your December 2018 statement and reports contributions, rollovers and fair market value of your IRA (other than Coverdell Education Savings Account). Amended information will be sent by the given date for accounts that have made 2018 contributions after the last day of December 2018 but before or on April 15, 2019.
Forms 1099-R and 1099-Q	January 31, 2019	This provides information on distributions from your Individual Retirement Account (IRA), Coverdell Education Savings account or 529 Plans.
IRA Corrected Valuations (for accounts with no December Statement)	January 31, 2019	This statement reports your year-end IRA portfolio valuation.
Schedule K-1	Master Limited Partnership (MLP) income and capital account (or cost basis) information will be mailed to you directly from the Limited Partnership General Partner in March or early April 2019. (This information is not provided by Wells Fargo Clearing Services, LLC.) The IRS mailing deadline for this information is April 15, 2019.	

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