

Tax form mailing schedule 2017



All forms are mailed within five business days of the available online dates, which are subject to change.

As highlighted below, the majority of the Brinker Capital Form 1099B will be available online by March 6, 2018. As with prior years, we recommend that clients wait until March 15, 2018, at the earliest, to file their taxes.

Mailing schedule by tax form		
Original tax form	Description	Available online
5498	Contributions and year-end market values for retirement.	01/22/2018
1099-R	Distributions from retirement accounts.	01/22/2018
1st mailing: 1099-B	Accounts holding Fidelity Funds and securities with no anticipated reclassification.	01/29/2018
2nd mailing: 1099-B	Accounts holding Fidelity Funds, non-Fidelity Funds, and securities with income reclassifications to date.	02/20/2018
1099: INFO only (corporate)	1099 supplemental information for corporate and eligible exempt accounts.	02/20/2018
1099: Preliminary Tax Statement *For 3rd & 4th mailings	Preliminary tax forms for accounts in 3rd or 4th mailing cycle.	02/20/2018
3rd mailing: 1099-B *Primary Brinker mailing	Brokerage accounts holding Fidelity Funds, non-Fidelity Funds, and securities with income reclassification completed to date.	03/06/2018
4th mailing: 1099-B	Brokerage accounts holding Fidelity Funds, non-Fidelity Funds, and securities with income reclassification completed to date.	03/12/2018
1042S	Brokerage accounts for nonresident aliens (NRA). The forms report all US source income distributions, retirement distributions, and NRA taxes withheld.	03/15/2018 (mail only)
1099-REMIC	OID and other periodic interest reported for brokerage accounts.	03/13/2018
592-B	Resident and nonresident withholding tax statement.	01/22/2018
2439	Undistributed long-term capital gains from a regulated investment company and taxes paid by the mutual fund.	03/12/2018
5500 AVS	Keogh Money Purchase and Profit Sharing Plans Annual Activity Statement.	04/23/2018
5498 (Spring)	Mutual funds and brokerage contributions and year-end market values to capture contributions made from January 1 to April 15 of the new year.	05/09/2018