

Tax form mailing schedule: 2018 tax year



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 2, 2019. As with prior years, we recommend that clients wait until March 15, 2019, at the earliest, to file their taxes.

Tax form mailing schedule		
Original tax form	Description	Available online
5498	Contributions and year-end market values for retirement	01/18/2019
1099-R	Distributions from retirement accounts	01/18/2019
592-B	Resident and non-resident withholding tax statement	01/19/2019
1st mailing: 1099-B	Accounts holding Fidelity Funds and securities with no anticipated reclassification	01/26/2019
2nd mailing: 1099-B	Accounts holding Fidelity Funds, non-Fidelity Funds, and securities with income reclassifications to date	02/16/2019
1099: INFO only (corporate)	1099 supplemental information for corporate and eligible exempt accounts	02/16/2019
1099: Preliminary Tax Statement <i>*For 3rd & 4th mailings</i>	Preliminary tax forms for accounts in 3rd or 4th mailing cycle	02/16/2019
3rd mailing: 1099-B *Primary Brinker Capital mailing	Brokerage accounts holding Fidelity Funds, non-Fidelity Funds, and securities with income reclassification completed to date	03/02/2019
4th mailing: 1099-B	Brokerage accounts holding Fidelity Funds, non-Fidelity Funds, and securities with income reclassification completed to date	03/08/2019
2439	Undistributed long-term capital gains from a regulated investment company and taxes paid by the mutual fund	03/09/2019
1042S	Brokerage accounts for non-resident aliens (NRA) which reports all US source income distributions, retirement distributions, and NRA taxes withheld	03/15/2019 (mail only)
5500 AVS	Keogh Money Purchase and Profit Sharing Plans Annual Activity statement	04/20/2019
5498 (Spring)	Mutual funds and brokerage contributions and year-end market values to capture contributions made from January 1 to April 15 of the current year	05/08/2019