TAX SEASON 2024

Keep this chart handy to see when your final forms for tax year 2023 will be ready.

Form Name	Mailing Dates	What's Reported
Consolidated 1099 Tax Statement	**January 19 & 26:** Accounts with the simplest tax information and not subject to income reclassification **February 2, 9, 16 & 23:** Accounts holding more complex securities, for which issuers provided final tax information after January 26 **March 1, 8 & 15:** Accounts where security issuers did not furnish tax information to LPL Financial in time for the anticipated February mailing deadline	All reportable income and transactions for the year. Depending on the account activity, the 1099 may include: Form 1099-B, Form 1099-DIV, Form 1099-INT, Form 1099-MISC, and Form 1099-OID.
Form 1099-R/Q	**January 19**	Distributions from qualified retirement plans (for example, individual 401[k], profit-sharing, and money-purchase plans), or any IRAs or IRA recharacterizations
Preliminary 1099 Consolidated Tax Statement	**February 16**	An advanced draft copy of the 1099-Consolidated tax forms. Includes accounts that won't receive a final 1099 Consolidated Tax Statement until all income data is finalized
Form 5498 IRA	**February 23 & May 24**	Contributions (including rollover contributions) to any IRA
IRS Tax Filing or Extension Request Deadline	**April 15**	The filing deadline to submit 2023 tax returns or an extension to file and pay tax owed for most taxpayers
Schedule K-1/ Form 1065 Partner's Share of Income, Deductions, Credits, etc.	**LPL Financial does not provide this form.**	Distributions from partnership securities; your partnership administrator should mail the K-1 by April 15. Please note: While the K-1 form itself accounts for distributions or other items being passed through to the partners, proceeds from the sale of partnership units are reported on the 1099-B section of the consolidated 1099

This information is not intended to be a substitute for specific individualized tax advice. We suggest that you discuss your specific tax issues with a qualified tax advisor.