Financial Research Associates, LLC
Financial Planning & Investment Management

# Issue #1128: News & Events

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Love is in the air!

Beacon Phoenix and Insurance, love and care each day show up as we work with our clients, our families, our communities and our planet. We hope that amid the Valentine's Day, we will find ways to support our loved ones and our community.

We're also including an update on the 1099 reporting schedule and a reminder about important dates including the Open Enrollment deadline and Important Dates.

As always, please reach out with your questions. We are here to support you!


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## Tax Documents Mailing Schedule

**All 1099 consolidated new statements will be mailed by February 15th, 2026.**

Unlike retirement, 1099's pertain to sales of income to be reported. Accounts with no income (no dividend or interest income) will not receive a 1099 consolidated statement. Accounts with only interest income or certain investments, are simply scheduled for later delivery.

Our custodians have a lot of work to do, and we want to provide you with accurate information. Some of the information we receive from our custodians is not available for broader distribution until later in January.

Please see LPL's Tax Form Mailing Schedule below:

| Form | Expected Mailing Date | Notes |
|---|---|---|
| 1099 Consolidated | February 15th | |
| 1099 Supplemental | March 15th | |
| 1099 Amended | March 15th | |
| 1099 Cost Basis Supplemental | March 15th | |
| 1099 Cost Basis Amended | March 15th | |
| 1099 Crypto Supplemental | March 15th | |
| 1099 Crypto Amended | March 15th | |
| 1099 Crypto Cost Basis Supplemental | March 15th | |
| 1099 Crypto Cost Basis Amended | March 15th | |
| 1099 Crypto Consolidated | March 15th | |
| 1099 Crypto Consolidated Cost Basis | March 15th | |
| 1099 Tax Reporting Statement Supplemental | March 15th | |
| 1099 Tax Reporting Statement Amended | March 15th | |
| 1099 Tax Reporting Statement Consolidated | March 15th | |
| 1099 Tax Reporting Statement Consolidated Cost Basis | March 15th | |
| 1099 Tax Reporting Statement Consolidated Crypto | March 15th | |
| 1099 Tax Reporting Statement Consolidated Crypto Cost Basis | March 15th | |
| 1099 Tax Reporting Statement Supplemental Crypto | March 15th | |
| 1099 Tax Reporting Statement Amended Crypto