Tax Form Mailing Dates | 2026

Tax Forms	Description	Available Online (on or before)
1099-Q (529 accounts)	Distributions from college savings accounts	January 16, 2026
Retirement Tax Forms 1099-R	Distributions from retirement accounts	January 16, 2026
Consolidated 1099s: First Mailing	Non-retirement accounts with holdings whose income doesn't require reclassification or additional information from issuers (Generally, this includes accounts holding options, certain equities, and fixed income securities.)	January 24, 2026
Consolidated 1099s: Second Mailing	Equities and fixed income securities, closed-end funds, and non-Fidelity mutual funds where issuer provided final tax information after first mailing; second mailing includes information-only 1099s issued for exempt accounts, including nonprototype and corporate accounts	February 7, 2026
1099: Preliminary Tax Statements	Point-in-time snapshot of reporting activity for customers slated for a later mailing; includes symbols/CUSIPs for positions that lack final tax information as of February 15, 2023 (This is online only, is not reported to the IRS, and should not be used for tax reporting purposes.)	February 12, 2026 (online only)
1099: Info-Only (Corporate and Nonprototype Accounts)	Supplemental tax reporting information for corporate and eligible exempt accounts; details aren't reported to IRS	February 12, 2026

This material has been provided for general informational purposes only and does not constitute either tax or legal advice. Investors should consult a tax preparer, professional tax advisor, and/or a lawyer.

WHZ
STRATEGIC WEALTH ADVISORS

WHZ Strategic Wealth Advisors
697 Pomfret Street, Pomfret Center, CT 06259 | 392-A Merrow Road, Tolland, CT 06084 (860) 928-2341 . info@whzwealth.com . whzwealth.com

Tax Form Mailing Dates | 2026

Tax Forms	Description	Available Online (on or before)
Consolidated 1099s: Third Mailing	1099 Consolidated Tax Form, Mailing cycle 3, available online; for brokerage accounts holding securities with income reclassifications to date	February 21, 2026
Consolidated 1099s: Fourth Mailing	Accounts holding UITs and REITs for which final tax information was delayed from issuer and mortgage-backed securities for which final tax information has been received from issue	March 11, 2026
Retirement Tax Forms 5498	Year-end market values of contributions to retirement accounts	May 15, 2026

This material has been provided for general informational purposes only and does not constitute either tax or legal advice. Investors should consult a tax preparer, professional tax advisor, and/or a lawyer.

WHZ
STRATEGIC WEALTH ADVISORS

WHZ Strategic Wealth Advisors
697 Pomfret Street, Pomfret Center, CT 06259 | 392-A Merrow Road, Tolland, CT 06084 (860) 928-2341 . info@whzwealth.com . whzwealth.com