

Annual Tax Dates for Trust Members

Document/Action	General Timing
RMD Calculation/Communication	On or before January 31
1099-Rs and 1099-NECs Mailing	By January 31
Consolidated 1099s Production	Begins in early February
IRA Contribution Deadline (Prior Year)	April 15*
Tax Return Due Date	April 15*
Form 5498 Production	May This document is not required to file a Form 1040 and is not produced until after the April 15 deadline.

***Important:** When April 15 falls on a weekend or legal holiday, the applicable deadline may move. Confirm exact dates with your Trust Services Team.