

Important Dates

In order to meet all IRS deadlines, reduce errors, and reduce the need to mail corrected versions, 1099 Consolidated statements will be mailed in four phases.

2017 Mailing Dates	Description
January 31	1099-R Form Mailing First Wave of 1099 Consolidated Forms Mailing -- <i>Includes accounts with the simplest tax information and not subject to income reclassification.</i>
February 15	Second Wave of 1099 Consolidated Forms Mailing -- <i>Includes accounts holding securities that may be subject to income reclassification.</i>
March 1	Third Wave of 1099 Consolidated Forms Mailing - <i>Includes accounts holding securities that may be subject to income reclassification where investment companies didn't furnish tax information to LPL Financial, the broker of record, in time for the February 15 mailing deadline.</i>
March 15	Fourth Wave of 1099 Consolidated Forms Mailing- <i>Includes AMBIR information and accounts where investment companies did not furnish tax information to LPL Financial, the broker of record, in time for the February 15 mailing deadline, and any accounts that hold securities that provide mortgage-backed income reporting information.</i>
April 18	IRS Tax Filing or Extension Request Deadline <i>Note: Emancipation Day is observed on Monday, April 17. Therefore, the tax filing deadline is moved to April 18.</i>
October 16	IRS Extension Tax Filing Deadline

Note: This information isn't intended to be a substitute for specific individualized tax advice. We suggest that you discuss your specific tax issues with a qualified tax advisor.