



IRS FORM MAILING DEADLINES FOR 2018



Your success. Our priority.

IRS form	Purpose	IRS Mailing deadline
1099R: Distributions from Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, etc.	Reports any reportable distributions paid from your retirement account	January 31
1099Q: Payments from Qualified Education Programs	Reports payments and distributions from a Coverdell Education Savings Account (formerly known as the Education IRA)	January 31
1099DIV: Dividends and Distributions	Reports dividends and distributions from the previous year and taxes withheld from your dividends even if you reinvested all fund distributions	February 15
1099B: Proceeds from Broker and Barter Exchange Transactions	Reports proceeds and certain other tax information from any redemption or exchange of shares from one fund to another	February 15
5498-ESA: Coverdell ESA Contribution Information	Reports contributions to a Coverdell Education Savings Account (formerly known as the Education IRA)	May 1
5498: IRA Contribution Information	Reports and regular or rollover IRA contributions or Roth contributions, as well as the fair market value of your retirement account(s) for the previous year Note: The fair market value of your retirement account(s) is also listed on your year-end statement. You do not need Form 5498 to file your taxes.	May 31

Note: If the standard IRS mailing deadline falls on a weekend or holiday, the adjusted deadline will be the next business day. The table above reflects these adjustments for 2018.