



New Wealthscape Investor's Tax Forms page enhancements for Tax Year 2022

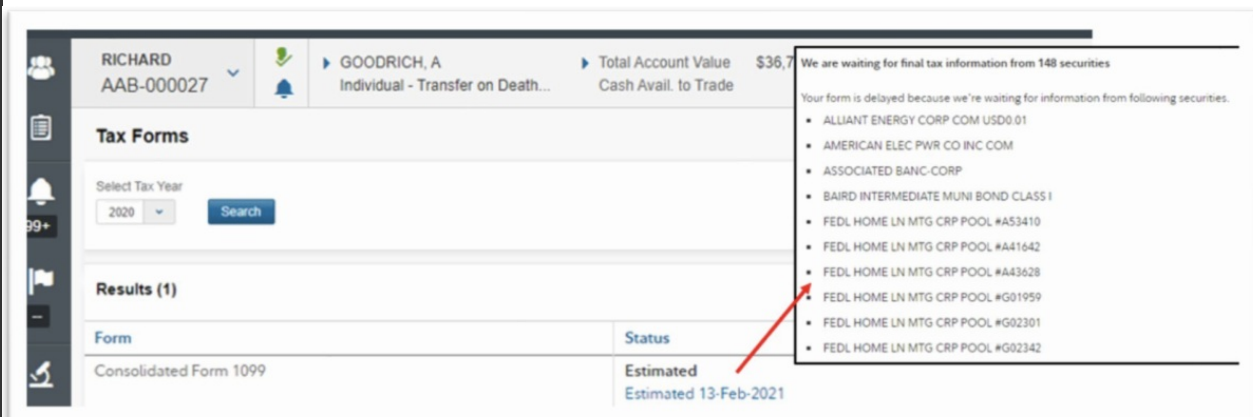
National Financial Services LLC (NFS) has made several enhancements to the Tax Forms page to help you prepare for your tax filing, including:

- Added status showing the estimated date of availability for forms which are in progress



Form	Status
Form 1099-R & Instructions	In Progress Estimated 30-Oct-2019
Form 5498	In Progress Estimated 30-Oct-2019

- Added position-level details for securities issuers who are delayed in their tax reporting



RICHARD
AAB-000027

GOODRICH, A
Individual - Transfer on Death...

Total Account Value \$36,7...
Cash Avail. to Trade

Tax Forms

Select Tax Year
2020 Search

Results (1)

Form	Status
Consolidated Form 1099	Estimated Estimated 13-Feb-2021

We are waiting for final tax information from 148 securities
Your form is delayed because we're waiting for information from following securities.

- ALLIANT ENERGY CORP COM USD0.01
- AMERICAN ELEC PWR CO INC COM
- ASSOCIATED BANC-CORP
- BAIRD INTERMEDIATE MUNI BOND CLASS 1
- FEDL HOME LN MTG CRP POOL #A53410
- FEDL HOME LN MTG CRP POOL #A41642
- FEDL HOME LN MTG CRP POOL #A43628
- FEDL HOME LN MTG CRP POOL #G01959
- FEDL HOME LN MTG CRP POOL #G02301
- FEDL HOME LN MTG CRP POOL #G02342

- Informational message for De minimis tax forms if your reportable amount is below IRS limits

De minimis

If your income is under the IRS reporting requirements

Fidelity follows the de minimis rules (i.e., not enough to be considered). If the income on your tax form does not exceed the IRS required reporting amount we don't mail a form or report the income to the IRS.

Results (1)

Form	Status	Other Formats & i
Consolidated 1099 Tax Form De minimis (What's this?)	Available Issued 21-Oct-2021	CSV format

If you receive a 1099 tax form for Tax Year 2022 please review the following information:

To provide accurate and timely tax statements, forms are not generated until NFS has received and processed all anticipated relevant tax information. Our goal is to send customers one tax form whenever possible.

Most 1099 tax forms for Tax Year 2022 will be available online between January 13 and February 11, 2023. Forms are mailed within 5 business days of posting online for customers who have not elected eDelivery.**

If a Preliminary Tax Form is posted to your account:

In the event final tax reporting information is expected beyond February 15*, a "Preliminary" tax statement will be available online by February 11, for customers moved to later mailing cycles. The preliminary form provides a single view of current tax information to assist in determining early tax liability. The accompanying cover-letter specifies a list of positions that are pending final tax information, when applicable. The Preliminary Tax Statement is only available online, is not reported to the IRS, and cannot be used for tax filing purposes.

A 30-day extension is requested from the IRS to permit the generation of some 1099 tax forms after February 15*. NFS will request this extension because not all issuers send final information in time to meet the standard February 15* IRS 1099 form delivery deadline. An extension reduces the need to send a corrected form.

Once NFS receives the final information needed, all 1099 tax forms will be available online no later than March 4. The 1099 tax forms to be generated after February 15* will not be definitively known until after the standard IRS mailing deadline because of the dependency on issuers providing final tax reporting information.

If you expect to receive a 5498 tax form for Tax Year 2022, then please review the following information:

By January 20, 2023, it is expected that all retirement accounts will have a Form 5498 available online to report fair market value and any contributions made in 2022. If prior-year contributions are made by April 18, 2023, an updated Form 5498 will be generated by the end of May to reflect the contributions made in 2023 for Tax Year 2022.

If you have any questions, please contact your financial advisor.

*1099 form delivery deadline for 2023 will be February 15, 2023.

**In the event a corrected tax form is received after a tax return filing, clients are encouraged to consult with a tax advisor to determine if amendments to their tax return are required. Corrected tax forms may be required in a variety of situations, most commonly due to the reclassification of income by an issuer at any point in time during 2022 or even later years.

Tax Form Distribution Dates*

Tax forms	Available Online	Mailed By Date
Retirement tax forms: 5498/1099-R	1/20/2023	1/27/2023
1099: 1 st mailing	1/21/2023	1/27/2023
1099: 2 nd mailing	2/11/2023	2/17/2023
1099: Preliminary Tax Statement	2/11/2023	Online Only
1099: 3 rd mailing	2/25/2023	3/3/2023
1099: 4 th mailing	3/04/2023	3/10/2023

Dates subject to change

SMRU # 5281791.1

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