2024 Tax Document Schedule

Tax season is upon us again. We wanted to help you understand what tax forms you will need to file your taxes this year and when you can expect those. If your accounts moved from one custodian to another in 2024, you would need the corresponding tax form from each custodian. These forms will be available through your online access to the custodian's website or will be mailed to your mailing address by the mail date indicated in the chart below. The custodian handles the preparation and distribution of your tax forms.

If you are unsure where your accounts were held in 2024 or what forms to expect, reach out and we are happy to help!

Retirement Accounts (IRA, Roth IRA, 401k, 403b, 457b, 401a)

Did you take distributions in 2024?

Yes. ↓

You will need a 1099R to file your taxes. See the 1099R delivery schedule below.

No. ↘

No impact on taxes and no tax forms.

Did you make a pre-tax contribution in 2024 to an IRA?

Yes. ↓

Indicate this amount to your accountant. You will receive a 5498 later, but this is not to file your taxes.

No. ↘

No impact on taxes and no tax forms.

Did you make contributions to an employer-sponsored retirement account directly from payroll?

If yes, this information will be on the W-2 your employer provides you.

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Did you rollover funds from an employer-sponsored plan to an IRA?

Yes.

Indicate this amount to your accountant and provide them with the 1099-R.

No.

No impact on taxes and no tax forms.

Investment Accounts (Joint, Individual, Trusts)

Did you have a taxable (non-retirement) investment account?

Yes.

You will receive a 1099. Refer to the delivery schedule for Consolidated Form 1099.

No.

No impact on taxes and no tax forms.

Tax Document Delivery Schedule

Custodian	Tax Document	Mail Date
Schwab*	Composite 1099	Jan. 31-Feb 28, 2025
	Form 1099R	January 31, 2025
	Form 5498	May 31,2025
TIAA-CREF	Form 1099R	January 31, 2025
	Form 5498	May 31, 2025
Fidelity	Form 1099R	January 31, 2025
	Form 5498	May 31, 2025

*If you have enrolled in PFA's Black Diamond portal, you can expect to receive notifications when tax forms are available. When available you can download your forms in your PFA Vault. Go to "Statements" then click "Tax Forms."