

When will my forms arrive?

Form*	When Available	You'll receive this form if you ...
1099-R	By close of business on January 22, 2018	Took a distribution or initiated a rollover from an IRA or employer-sponsored plan, re-characterized IRA assets, or converted to a Roth IRA.
1099-B	February 14, 2018	Sold or exchanged shares of a fund (other than a money market fund) in a nonretirement account, or had certain transactions in a nonretirement brokerage account, such as the sale of security shares or the maturation of individual bonds.
1099-DIV	February 14, 2018	Received dividends (ordinary and qualified) or capital gains distributions from taxable accounts, foreign tax paid in nonretirement accounts, and interest dividends (including specified private-activity bond interest) from tax-exempt bond funds and money market funds. <i>Note: If your distributions and dividends amounted to less than \$10, you won't receive Form 1099-DIV.</i>
1099-INT	February 14, 2018	Interest dividends (including specified private-activity bond interest) from tax-exempt bond funds will be reported on Form 1099-DIV. For brokerage accounts, Form 1099-INT will still report taxable and tax-exempt interest income from individual bonds and other interest-bearing investments.
1099-MISC	February 14, 2018	Received substitute payments in lieu of dividends for securities held in a nonretirement margin account.
1099-OID	February 14, 2018	Owned a bond at any point in the year that was originally purchased at a discount.
1099-Q (529 Plans)	January 22, 2018	Received a distribution from or completed an asset transfer in the 529 College Savings Plans.
1099-Q (ESAs)	January 22, 2018	Received a distribution from or completed an asset transfer in an education savings account (ESA).
5498-ESA**	April 24, 2018	Contributed or transferred assets to an education savings account.
5498**	May 18, 2018	Made a tax year 2014 IRA contribution between January 1, 2014, and April 15, 2015; completed an IRA rollover, recharacterization, or conversion; or are required to take required minimum distributions.