Clients to Receive Form 5498 Mid-May

Your clients will start receiving their Form 5498 from us soon. It is an informational document that shows IRA contributions, recharacterizations, conversions and more. **Note:** This form is not necessary for tax return filing.

We started mailing these forms around May 10. Clients can expect to start receiving their forms mid-May.

At the end of May, you will be able to access these forms online on the client website and MyPortal.

For more information on Form 5498, check out our updated FAQ.

View Form 5498 FAQ

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