

2016 Form 5498 Mailing Notice

Forms 5498 for the 2016 tax year will be mailed to account owners by May 31, 2017. The information on Form 5498 is submitted to the Internal Revenue Service (IRS) to report contributions, including any catch-up contributions, notice of a 2017 Required Minimum Distribution (RMD), the Fair Market Value (FMV) of Individual Retirement Accounts and other Form 5498 reportable activity.

Boxes 12a, (RMD date) and 12b (RMD amount) will not be populated since RMD notifications were mailed to clients of RMD age in January 2017.

Online Access – 2016 Forms 5498 will be available on Liberty under Tax Information and Tax Forms respectively on May 31, 2017. Applicable RMD Notices are also viewable in this section.

Note:

If there were no 2016 contributions or other reportable activity, account owners will not receive a 2016 Form 5498. The 2016 Fair Market Value reported on the year-end statement will be provided to the IRS.

If you have any questions regarding this notice, please contact your relationship manager.