

2023 Form 5498 Mailing Notice

2023 Taxes



Form 5498 for the 2023 tax year will be mailed or sent via eDelivery to account owners and made available in the Axos Client Portal and Liberty by May 31, 2024.

The information on Form 5498 is submitted to the IRS to report contributions, including any catch-up contributions, notice of a 2023 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 or sent via eDelivery to clients of RMD age in January 2023.

Online Access

2023 Form 5498 will be available in the Axos Client Portal under "Statements and Documents" or on Liberty under "Tax Information" and "Tax Forms," respectively, by May 31, 2024. Applicable RMD notices are also viewable in these areas.

If there were no 2023 contributions or other reportable activity in an account, account owners will not receive a 2023 Form 5498. The 2023 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 Client Service Advocate.

Investment Products: Not FDIC Insured - No Bank Guarantee - May Lose Value.

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