

New Standard Report for Bundled Tax Forms

Enhancement Now Available

Axos Advisor Services is excited to share that we have a new standard tax form bundle report to enhance your tax time experience by streamlining the process of pulling your client tax forms and saving you time.

This standard report enhancement will provide you with the ability to pull all your clients' tax forms into one zip file to download rather than having to pull from individual accounts or request a special report. You will have the ability to pull your clients' tax forms by:

- form type
- year, and
- a choice of current, original, or corrections

This new form can be found in the Standard Reports tab under Documents in Liberty, titled Client Tax Forms Bundled.

The release of tax forms follows the IRS mailing deadline schedule, as outlined below. If you attempt to pull the report prior to the deadline date, you will receive an error message.

- 1099s and RMD Letters – January 31, 2024
- Consolidated 1099 – February 15, 2024
- 5498s – May 31, 2024

If you have any questions about tax forms or standard reports, please contact your Client Services Advocate.

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

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