

Expected 2008 Tax Form Release Dates

FEBRUARY 2008

The following are the dates for expected mailing of tax-year 2007 tax-related forms and IRS tax deadlines:

Mailing	Expected Date	Description
IRA Fair Market Value	January 31, 2008	IRA account value as of the last business day of 2007.
Consolidated Statement & Form 1099 – DIV Form 1099 – INT Form 1099 – OID Form 1099 – B Form 1099 – MISC Form 1099 – C	February 28, 2008 (With approved IRS extension. Most will be mailed by February 15, 2008.	Reportable taxable income from your accounts.
Form 1099 – R and 1099 – Q	January 31, 2008	Distributions from your IRA, retirement accounts, or Educational Savings Account
Form 1099 – OID (REMIC)	March 17, 2008	Original Issue Discount and Interest from CMOs/REMICs
Schedule K-1	March 17, 2008	Master Limited Partnership Income (from the General Partner)
Deadline to file personal income tax return	April 15, 2008	
Deadline to make 2007 contribution to Educational Savings Account	April 15, 2008	
Deadline to open and contribute to an IRA for 2007	April 15, 2008	
Deadline to open and contribute to SEP for 2007	April 15, 2008 (or extended tax filing date)	Contributions made after December 31, 2007 will be reported on 2008 form 5498.
Form 5498 - ESA	April 30, 2008 (mailed with December Statement in most cases)	Contributions to your Educational Savings Account
Form 5498	June 2, 2008 (mailed with December Statement in most cases)	Contributions, rollovers and fair market value of your IRA

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