Lexington Office
2704 Old Rosebud Road, Suite 180
Lexington, KY 40509
P: 859-309-0349 **F:** 859-309-0941
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TAX PREPARATION CHECKLIST

INCOME

- W2s (Income earned from work)
- Social Security (SSA-1099)
- Pensions, IRAs, Retirement (1099 R)
- Interest Income (1099 Int)
- Dividends (1099 Div)
- Gains & Losses (1099 B)
- 1099 Combined (i.e. Fidelity will combine the above Interest, Dividends, & Gains/Losses into one form)

OTHER POSSIBLE INCOME

- Rental Income
- Self-Employment Income
- Farm Income
- Gambling Income (W2G)

OTHER POSSIBLE ITEMS

- Student Loan Interest (1098 E)
- Tuition (1098 T)
- Traditional IRA/Roth IRA Contributions
- Roth Conversions (is not noted on forms so need to make sure told was a conversion)
- Qualified Charitable Contributions (QCD) No form so client has to make sure to inform CPA
- 5498 IRA Statement—if you are making IRA contributions or conversions

ITEMIZED DEDUCTION ITEMS

- Medical & Dental (very few qualify, often they must be a significant amount)
- Property Taxes (home, vehicles, boats, etc.)
- Mortgage Interest (Form 1098)
- Charitable Cash contributions (if QCD, need to be noted separately)
- Non-cash contributions (Physical items donated to charitable organizations)

1.20.2026

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FIDELITY 2025 TAX FORM DELIVERY CALENDAR

Tax form schedule
Review the dates standard tax forms are available online. You can also log in to view your personalized tax form schedule.

To ensure you receive your Fidelity Tax Forms, log in to your Fidelity account, on the top left of the page, click on Accounts & Trade—then select Tax Forms & Information from the drop-down box. It will take you to a page Tax Information—and click on the green box View your tax forms.

Form name	Available online*	Sent by mail*
1099-Q	January 16	January 21
1099-R	January 16	January 21
5498 (Crypto)	January 31	January 31
1099 (Group 1)	January 24	January 29
1099-DA	February 17	February 17
1099 (Group 2)	February 7	February 12
1099 (Group 3)	February 21	February 26
1099 (Group 4)	March 11	March 16
5498, 5498-SA This form isn't needed to file taxes.	May 15	May 20

**Dates are subject to change due to unforeseen circumstances. For clients set to receive their form(s) by mail, the form will generally mail within 5 business days of the online activation date.1.20.2026*

Lexington, KY ● Georgetown, KY ● Harrodsburg, KY ● London, KY ● Hurricane, WV

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