Form Name	Mailing Dates	What's Reported
Consolidated 1099 Tax Statement	**January 19 & 26** Accounts with the simplest tax information and not subject to income reclassification **February 2, 9, 16 & 23** Accounts holding more complex securities, for which issuers provided final tax information after January 26 **March 1, 8 & 15** Accounts where security issuers did not furnish tax information to LPL Financial in time for the anticipated February mailing deadline	All reportable income and transactions for the year. Depending on your account activity, your 1099 may include: Form 1099-B, Form 1099-DIV, Form 1099-INT, Form 1099-MISC, and Form 1099-OID.
Form 1099-Q	**January 19**	Distributions from qualified tuition programs and Coverdell Education Savings Accounts (ESAs)
Form 1099-R	**January 19**	Distributions from qualified retirement plans (for example, individual 401[k], profit-sharing, and money-purchase plans), or any IRAs or IRA recharacterizations
Preliminary 1099 Consolidated Tax Statement	**February 16** **Statements will be available online on Account View or through your financial professional, not mailed.**	An advanced draft copy of your 1099-Consolidated tax forms. Includes accounts that won't receive a final 1099 Consolidated Tax Statement until all income data is finalized.
Form 5498 IRA	**February 23 & May 31**	Contributions (including rollover contributions) to any IRA
Form 1042-S Foreign Person's U.S. Source Income Subject to Withholding	**March 15**	Interest, dividends, and federal taxes withheld
IRS Tax Filing or Extension Request Deadline	**April 15**	The filing deadline to submit 2023 tax returns or an extension to file and pay tax owed for most taxpayers.
IRS Extension Tax Filing	**October 15**	Deadline Filing for individuals who have automatic 6-month extensions (may differ for those outside the United States)
Schedule K-1/Form 1065 Partner's Share of Income, Deductions, Credits, etc.	**LPL Financial does not provide this form.**	Distributions from partnership securities. Your partnership administrator should mail your K-1 by April 15. Please note: While the K-1 form itself accounts for distributions or other items being passed through to the partners, proceeds from the sale of partnership units are reported on the 1099-B section of your consolidated 1099.