

# Taxes: 2025 Tax Planning

## Important Reminders

Get ready for the 2025 tax season with all the essential information on tax forms and the delivery schedule from Axos Advisor Services to help you plan ahead.

All 2025 tax forms are supported by enhanced reporting processes designed to provide clearer forms, improved accuracy, and timely corrections when updates occur. Learn more about [our partnership with Maxit.](#)

## Tax Information Statements

Clients' tax information statements, which include 1099 forms, will be delivered as early as possible. Axos Advisor Services will mail or send via eDelivery 1099-R tax statements by January 31, 2026.

- If filing via TurboTax or H&R Block:
  - Clients have two options:
    - Clients can search for Axos Advisor Services in TurboTax and H&R Block to have their tax documents digitally migrated to TurboTax/HR Block
    - Clients can download these files from the Axos Client Portal and then load them in TurboTax/HR Block
- Required Minimum Distribution (RMD) account owner notifications will be mailed on or before January 31, 2026, and available online by January 21, 2026, providing earlier visibility to support planning conversations. Please note that we will not be including the RMD distribution form in our mailing this year.
- All non-retirement account tax forms will be mailed and available online by February 13, 2026. Non-retirement tax forms being mailed include Forms 1099-B, 1099-DIV, 1099-INT, 1099-MISC, and 1099-OID (as applicable), their associated detailed reports, a fee statement (if applicable), and a reference sheet titled "1099 Reporting Information for 2025."
- Corrected 1099s will be issued as needed.

## Tax Form Delivery Schedule

Form	Mailing Schedule	Explanation of Form
Year-End Statement	Mid-January	Reports distributions and activity in each account for the year, including any tax-free income and year-end balances for IRA accounts.
Form 1099-R	January 31	Form 1099-R reports withdrawals from retirement accounts. Reports distributions.

Combined Tax Package for Form 1099-DIV, 1099-B, 1099-MISC, 1099-OID, 1099-INT	February 15	Taxable activity for accounts. Form 1099-DIV reports distributions and exempt interest dividends. Form 1099-B reports proceeds from sales or exchanges, along with total costs and total gain or loss on shares sold (when available).
Online Tax Aid	February 15	Tax data imports available for TurboTax and H&R Block software.
K-1s	Mid-April	K-1 forms are sent directly by the limited partnership. If you own limited partnership units, please contact the company directly for information.
Form 5498	May 31	Reports contributions and rollovers to Traditional and Roth IRAs, SEP-IRAs, and SIMPLE IRAs.

*\*Please be aware that some issuers do not make their final distribution information available until after January.*

## The 2025 Tax Filing Deadline is April 15, 2026

Taxpayers have until April 15, 2026, to file their 2025 tax returns, pay any tax due, or to file a filing extension request.

### Questions

Please reach out to your Client Service Advocate for any questions.

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

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