2025-26 Tax Season Mailing Schedule

LPL mails 1099 Consolidated Tax Statements out to clients between January and March. This allows you to receive your tax forms as quickly as possible and meet all IRS deadlines, while reducing the need to mail a corrected 1099. You may also view copies of 1099s in Account View 2.0.

Tax Form	Available Online Date	Mailed by Date
Form 1099-Q Tax Statement	**January 17**	**January 23**
Form 1099-R Tax Statement	**January 17**	**January 23**
1099 Consolidated Tax Statement	**January 17 & January 31:** Accounts with the simplest tax information are not subject to income reclassification.	**January 23 & February 6**
	February 14: Accounts holding more complex securities, for which issuers provided final tax information after January.	**February 20**
	February 28 & March 11: Accounts where security issuers did not furnish tax information to LPL in time for the anticipated February mailing deadline.	**March 6 & March 16**
Preliminary 1099 Consolidated Tax Statement	**February 14:** Accounts that are still waiting on final income reclassification will receive an advanced draft copy, "Preliminary 1099 Consolidated Tax Statement".	These are only available electronically and will not be mailed.
5498 - IRA	**February 28 & May 23**	**March 6 & May 29**

Note about Schedule K-1/Form 1065: LPL does not mail this form to clients. This form reports distributions from partnership securities. The partnership administrator should mail the K-1 by April 15. 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 the consolidated 1099.