



CELEBRATING 25 YEARS!

Announcement

Timing of Consolidated Form 1099s for Tax Year 2023 TD Ameritrade & Charles Schwab

2/2/2024

We would like to keep you informed as to the estimated availability dates for the tax year 2023 tax forms.

Timing of Available Tax Documentation for Charles Schwab Accounts

Given the information below, we recommend you provide 1099s to your accountants no earlier than the 1st Correction Cycle, which is March 14, 2024.

You can find your issued tax documents on the 1099 Dashboard at schwaballiance.com.

We have listed useful information below pertaining to the anticipated dates of Charles Schwab and TD Ameritrade's 2023 tax forms.

Please note that clients who transitioned from TD Ameritrade to Charles Schwab in September 2023 will be receiving two (2) tax forms per account.

2023 Tax Form Schedule

	Available Online By	Mailing Begins
TD Ameritrade 1st Production Run	January 19	January 19
Schwab 1st Production Run	February 2	February 2
TD Ameritrade 2nd Production Run	February 2	February 2
Schwab 2nd Production Run	February 16	February 16
TD Ameritrade 3rd Production Run	February 16	February 16
TD Ameritrade 4th Production Run	February 29	February 29

Correction Cycles

Correction cycles begin on March 1, 2024 for Charles Schwab accounts and March 14, 2024 for TD Ameritrade accounts.

In an effort to allow sufficient time to capture as many income reallocations as possible, Charles Schwab has designated the following dates for any necessary 1099 corrections.

Charles Schwab Issued Forms

- **1st Correction Cycle - March 1, 2024**
- 2nd Correction Cycle - March 15, 2024
- 3rd Correction Cycle - March 22, 2024

TD Ameritrade Issued Forms

- **1st Correction Cycle - March 14, 2024**
- 2nd Correction Cycle - March 21, 2024
- 3rd Correction Cycle - April 4, 2024

As a reminder, best practices suggest that investors wait until 1099s are no longer being corrected before filing taxes.

If you have any additional questions, please don't hesitate to call us.

Please feel free to call or email us with any questions!

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