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## 5498 Tax Form

Spring is a time for sunshine, warmer weather, and a quick reminder regarding the 5498 Tax Form you may receive in the mail. Please don't be alarmed; this form is for informational purposes only and is **not** required to be filed with your tax return.

If you made a 2016 contribution to your Traditional, Roth, SEP, or Simple IRA accounts, you will receive a 5498 Tax Form. The form is deliberately sent after the tax deadline to allow for contributions that were made in the current year, but attributed to the prior year. In addition to reporting contributions, the 5498 form reports year-end market values, Roth conversions, recharacterizations, rollovers, and required minimum distribution (RMD) information.

It is a good idea to compare the form with your tax return to be sure that your retirement account activity is reflected properly. You can then keep the form with your completed 2016 Tax Return.

As always, please feel free to contact us with any questions.

Kind regards,  
Meghan



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