PLEASE GIVE THIS TO YOUR TAX PREPARER

Jarvis Financial

2019 Tax Information

Smith, John & Jane

JARVIS FINANCIAL

The following is a list of your accounts held through Jarvis Financial and the respective tax forms that you will need from each account to complete your 2019 tax return. Please note that we only have tax information on the accounts through our office.

Account Name	Account Number	Tax Form	Special Notes:
Fidelity - Charitable Giving Fund	00000000	NONE	Form 8283 mailed by 3/31
Fidelity - IRA, Jane	00000000	NONE	None
Fidelity - IRA, John	00000000	1099	ROTH Conversion
Fidelity - Joint	00000000	Tax Report/1099	None
Fidelity - ROTH, John	00000000	NONE	None
Prudential - IRA, John	00000000	NONE	None

PLEASE REMEMBER THE FOLLOWING:

- ⇨ The deadline for companies to make all form 1099's available is February 15th. Different types of accounts (e.g. IRA, Joint, etc.) are generated at different times and may arrive separately.
- ⇨ In an effort to save trees (and money), many companies are no longer mailing 1099s and are instead posting them online.
- ⇨ All Traditional IRA, Rollover IRA and ROTH IRA accounts will generate a form 5498 which is not typically needed for tax preparation.

If you are missing a 1099 or if you have any questions or concerns regarding your accounts through our office, please contact us at Clients@JarvisFinancial.com. Once your 2019 tax return is complete, please send us a copy so that we can continue providing you with the best possible tax strategies.

SCAM ALERT – Please assume that every email or phone call you receive is a scam until proven otherwise. The FTC estimates that $17 MILLION was lost to IRS scams and another $19M to Social Security scams. Don't be the next scam victim! When in doubt, call our office.

Our attorneys would like us to remind you that this report is provided as a courtesy and is for informational purposes only. Only the tax information you receive directly from your investment companies should be considered official. This guide is not a replacement for having a licensed professional complete your tax return.