

# Annuities



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## ANNUITY NEWS

JANUARY 10, 2024

### Important Dates for Tax Documents

As we enter tax season, RSL would like to share mail dates for common tax documents. The mail dates listed below comply with IRS guidelines, and we hope that this information will help our business partners assist customers with tax reporting questions. We will also update telephone prompts to include the mail date for 1099 forms.

IRS Form or Notification	What We Report	Mailed by
RMD Notification for 2024	RMD amount for 2024	January 31
1099-I	Interest income	January 31
1099-R	Distributions from qualified annuities	January 31
1099-NEC	Other income or commissions	January 31
1042-S	Payments to non-residents that are subject to withholding, including interest	March 15
5498	Individual and rollover contributions to Traditional and Roth IRAs	January 31 - (for all contributions made/processed in 2023)
		May 31 - (*contributions made/processed in 2024 for 2023 tax year)

*\*2023 contributions made in 2024 must be received by 4/15*

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