A COPY OF THIS SUMMARY HAS BEEN SENT TO YOUR TAX PREPARER

DEFINE FINANCIAL

2025 Tax Information

SAMPLE

We hope you had a safe and enjoyable holiday season and that your new year is off to a great start. As with every new year, we're greeted with the beginning of tax season!

Tax Day is Tuesday, April 15th, 2026 and one of the keys to a stress-free tax season is having all the documents you need on hand. The trick, however, is knowing which forms to expect. That is what we are here to help with.

The following is a list of your Fidelity accounts managed by Define Financial and the respective tax forms you will be receiving from each account to complete your 2025 tax return. **If you transferred accounts to Fidelity in 2025, you may still receive separate tax documents from your former custodian(s).**

Account Name	Account Number	Tax Form	Special Notes
Individual	XXX-XX0000	FORM 1099	None
John Rollover IRA	XXX-XX0000	FORM 1099-R	Roth Conversion - $110,000
Jane Rollover IRA	XXX-XX0000	FORM 5498	None
John Roth IRA	XXX-XX0000	FORM 5498	Roth Conversion - $110,000
Trust	XXX-XX0000	FORM 1099	None
DAF	XXX-XX0000	FORM 8283	DAF Contribution - $175,000 (See Attached)
Inherited IRA	XXX-XX0000	FORM 1099-R	10-Year Rule (Dec 2031)

PLEASE REMEMBER THE FOLLOWING:

- Your tax documents may be accessed in your Client Portal (www.definefinancial.com/xxx) using the following menu selections: **Vault > Brokerage Account Documents > Tax Documents**

- The earliest you can expect to receive your Fidelity tax documents would be the 2nd week of January and the latest would be mid-March.

- Deductible advisory fees (if any) will be listed on the “account fees” section of your 1099. Fees billed to your IRA or ROTH are **NOT deductible** because they were paid with tax-advantaged dollars.

If you need help gathering your tax documents or would like us to send duplicate copies to your Tax Preparer, please contact us at xyz@company.com or (123) 456-7890. Once your 2025 tax return is complete, please send a copy to our office so that we may continue providing you with the best possible tax strategies.