WASHINGTON TRUST
Wealth Management®

January 2020

Tax Year 2019 Estimated Tax Form Delivery Schedule

This schedule estimates when you can expect to receive tax forms for your Washington Trust Wealth Management account(s).

The date(s) that you can expect to receive tax forms depends on the type of account:

TAX FORM	TYPE OF ACCOUNT	ESTIMATED DELIVERY DATE
Form 1099-R	**Individual Retirement Account (IRA)**	**January 31, 2020**
Form 1099 (consolidated)	**Investment Management Agency or Custody**	**February 10 – February 15, 2020** (includes IRS-approved extension for 1099 mailings)
Grantor Tax Information Letter	**Grantor Trust**	**February 10 – February 15, 2020**
Form 1041 Schedule K-1	**Trusts (non-grantor)**	**February 10 – February 28, 2020**

Please note:

- **Clients who enroll in our client portal can access, print, and send their 1099 tax forms electronically before the hard copy is even mailed.**
- **The dates above are estimates.** The delivery schedule may be delayed by circumstances beyond our control, including the need to receive factoring information or tax documents from third parties for certain types of investments held in an account, such as:
  - Master Limited Partnerships and Exchange Traded Funds structured as limited partnerships
  - REITs (Real Estate Investment Trusts)
  - REMICs (Real Estate Mortgage Investment Conduits)
  - MBS (Mortgage Backed Securities)
  - Royalty Trusts

If you have any questions, please contact your Wealth Management Account Officer.