Hello Account Holder,

Tax documents for 2021 for your IRA account at Preferred Trust Company will be available online on **January 31st, 2022**. You will be able to access your tax documents by logging into your online account portal. On January 31st, they can be located by selecting the "Statements" screen once logged into your portal. Preferred Trust Company does not mail paper tax forms to current clients nor do we email tax forms for security reasons.

There are two forms that you may be eligible for: Form 1099-R and Form 5498.

Clients will only receive **Form 1099-R** if they received a personal distribution of cash and/or assets for tax year 2021.

Clients will only receive **Form 5498** if they had an account open with Preferred Trust Company as of December 31, 2021. Form 5498 discloses the value of your account (cash and investments) as of the last day of the year, and includes the total amount of any contributions made to the account for tax year 2021.

Form 5498 will also indicate if a RMD (Required Minimum Distribution) is applicable for you for tax year 2022. This amount is based on your age and the value of your account with Preferred Trust Company. It does not take into account any other retirement accounts you may have at other financial institutions. It is recommended that you speak with your CPA or a tax specialist to finalize your RMD amount.

Please review your tax documents thoroughly and contact Preferred Trust Company if you feel the information is incorrect. Annual Statement Packages will be provided to clients via the online account portal by March 31, 2022 for 2021.

Please contact our Client Service department by replying to this email or calling 702.990.7892 opt. 2 with any questions or if you need assistance accessing your account online.

PREFERRED TRUST COMPANY

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