



Announcement

Timing of Consolidated Form 1099s for Tax Year 2025

Tax season has a way of sneaking up on all of us, so we wanted to keep you informed about when your 2025 tax forms should be available.

Given the information in the chart below, we recommend you provide 1099s to your accountants no earlier than the 1st Correction Cycle.

You can find your issued tax documents on the 1099/Tax Dashboard for each custodian on the applicable website.

2025 Tax Form Schedule

Company Name	Available Online By	Mailing Begins
Charles Schwab	January 16, 2026	January 30, 2026 February 13, 2026 February 27, 2026
Fidelity (Orion)	January 16, 2026 1099 Informational Tax Statement February 12, 2026	January 24, 2026 February 7, 2026 February 21, 2026 March 11, 2026
Fidelity (Advisors Capital Management)	January 16, 2026 February 7, 2026 March 11, 2026	February 7, 2026
Jackson National	January 31, 2026	January 31, 2026
NFS	January 16, 2026 February 7-21, 2026 March 11, 2026	January 16, 2026 February 7-21, 2026 March 11, 2026

Correction Cycles

Correction cycles begin as follows:

Charles Schwab Issued Forms

- **1st Correction Cycle: February 13, 2026**
- **2nd Correction Cycle: Weekly on Wednesday from February 18-April 29, 2026**

Fidelity Issued Forms

- **1st Correction Cycle: February 14, 2026**
- **2nd Correction Cycle: February 26, 2026**
- **3rd Correction Cycle: March 12, 2026**
- **4th Correction Cycle: March 26, 2026**

As a reminder, best practices suggest that investors wait until 1099s are no longer being corrected before filing taxes.

All dates are estimated and subject to change.

If you have any additional questions, please do not hesitate to reach out to us.



Securities offered through Cambridge Investment Research, Inc, a Broker/Dealer, Member FINRA/SIPC. Advisory services offered through Cambridge Investment Research Advisors, Inc., a Registered Investment Advisor. Cambridge and Athena Legacy Solutions LLC are not affiliated. Cambridge does not offer tax or legal advice