

Mutual Fund Tax Guide

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4 Reports backup withholding to include on your tax return as taxes withheld 5 If this box displays YES, the shares sold were non-covered (cost basis not reported to the IRS) and boxes 1b, 1e, and 1g may be blank Mailed By: February 15, 2018 Tax Forms - Taxable Accounts page 4 Tax Guide 2017

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This guide may assist you in preparing your tax return, but it is not intended to provide specific tax advice. Who should I contact for tax advice? Given the scope and complexity of tax laws, please consult your tax or financial advisor who can provide advice based on your personal financial history, and can best assist you in preparing your tax return.

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Allianz Family of Funds 2018 Mutual Fund Tax Guide. Understanding your Tax Form. Tax Form Description 1099-B If shares of a fund in an account other than a retirement account (401(k), IRA etc.) are sold, you will receive a. Fund: Fund: information.

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More Pain for Some Mutual Fund Shareholders in 2018 Ongoing redemptions from active funds and a long-running bull market mean tax pain for many fund investors in taxable accounts.

Morningstar's 2018 Year-End Tax Guide

Fidelity Mutual Fund Tax Information. Get tax information for domestic and international Fidelity funds and other important notices such as corporate actions. Note: This information is given for tax-planning purposes and may not be accurate for tax reporting; please use the tax form statements Fidelity mails early in the year to prepare your tax returns.

Fidelity Mutual Fund Tax Information - Fidelity

What Mutual Funds Are, How Mutual Funds Work, and Much More. Whether you own them through your retirement plans, such as a 401 (k) or IRA, or you buy them directly or through a brokerage account , this guide to mutual fund investing was designed to help you understand what they are, how they work, and things you may want to consider.

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