

## **I have a retirement plan. When will I receive my 5498?**

### Individuals

Form 5498 is used for reporting regular or rollover contributions and value of an IRA, Roth IRA, ESAs, SEP, or SIMPLE IRA. This form does not need to be filed with the owner's Tax Return (1040) - it simply needs to be reported.

Security Benefit is only required to notify IRA, Roth IRA, ESA, SEP and SIMPLE IRA owners of their Fair Market Value. IRA contributions and rollovers are reported to the client by May 31 of each year. The form is only issued if a contribution or rollover occurred during the year.

Nothing contained herein is intended to be