



Important End of Year Deadlines

To ensure we have the ability to complete your transaction in a timely manner, documents must be received by our office in good order by the following dates:

December 2, 2022	Roth IRA conversion (requiring a NEW Vantage Roth IRA account)
December 9, 2022	Roth IRA conversion (using existing Vantage IRA accounts)
December 9, 2022	IRA Distribution for a 2022 Required Minimum Distribution (as applicable)
December 9, 2022	Re-registration documentation for in-kind assets being converted/distributed in 2022
December 28, 2022	Last day for 2022 transaction processing of outgoing cash transactions
January 5, 2023	2022 Fair Market Valuation form and substantiating documents
April 15, 2023	2022 IRA contributions into Traditional or Roth IRA accounts

You can expect to receive the following documents from Vantage:

February 2023	2022 Annual Statement as of December 31, 2022 (mailed by January 31, 2023)
February 2023	1099R Form (mailed by January 31, 2023)
June 2023	5498 Form (mailed by May 31, 2023)



Complete All Your Transactions Online

Complete transactions, including your Annual Fair Market Value, electronically through our secure client portal. All you will need to do is Login to [myVANTAGEpoint](#) and select the transaction type to complete the form.

More Security for Your Vantage Account

We care about protecting your personal and account information. Now you can add additional security functionality on your Vantage account. These additional verification steps will help protect against fraud and identity theft. Login to [myVANTAGEpoint](#) and click the Security Center tile to get started.