



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 1, 2023	Roth IRA conversion (requiring a NEW Vantage Roth IRA account)
December 8, 2023	Roth IRA conversion (using existing Vantage IRA accounts)
December 8, 2023	IRA Distribution for a 2023 Required Minimum Distribution (as applicable)
December 8, 2023	Re-registration documentation for in-kind assets being converted/distributed in 2023
December 27, 2023	Last day for 2023 transaction processing of outgoing cash transactions
January 5, 2024	2023 Fair Market Valuation form and substantiating documents
April 15, 2024	2023 IRA contributions into Traditional or Roth IRA accounts

You can expect to receive the following documents from Vantage:

February 2024	2023 Annual Statement as of December 31 (mailed by January 31, 2024)
February 2024	1099R Form (mailed by January 31, 2024)
June 2024	5498 Form (mailed by May 31, 2024)



Complete Your Annual Fair Market Value Online!

You can now complete your Annual Fair Market Valuation electronically through our secure client portal. Login to your account at VantagelRAS.com and click "Initiate a Transaction" to get started.

More Security for Your Vantage Account

We care about protecting your personal and account information. Now you can add additional security functionality to your Vantage account. These additional verification steps will help protect against fraud and identity theft. Login to your account at VantagelRAS.com and click Security Center to get started.