



Important End of Year Deadlines

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

December 2, 2024	Roth IRA conversion (requiring a NEW Vantage Roth IRA account)
December 6, 2024	Roth IRA conversion (using existing Vantage IRA accounts)
December 6, 2024	IRA Distribution for a 2024 Required Minimum Distribution (as applicable)
December 6, 2024	Reregistration documentation for in-kind assets being converted/distributed in 2024
December 26, 2024	Last day for 2024 transaction processing of outgoing cash transactions
January 5, 2025	2024 Fair Market Valuation form and substantiating documents
April 15, 2025	2024 IRA contributions into Traditional or Roth IRA accounts

You can expect to receive the following documents from Vantage:

February 2025	2024 Annual Statement as of December 31 (mailed by January 31, 2025)
February 2025	1099R Form (mailed by January 31, 2025)
June 2025	5498 Form (mailed by May 31, 2025)



Complete Your Annual Fair Market Value Online!

Complete your Annual Fair Market Valuation electronically through our secure client portal. Login to your account at VantageIRAs.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 VantageIRAs.com and click Security Center to get started.