

Tax forms delivery schedule for Victory Funds, Marketplace accounts and USAA® 529 Education Savings Plan

Tax Year 2023

FORM TYPE	IRS MAIL TO SHAREHOLDER DEADLINE	TARGET MAIL BY	ESTIMATED ONLINE VCM.COM	ESTIMATED TURBOTAX® AVAILABILITY
1099-R	1/31	1/26-1/27	1/31	2/1
1099-Q 529	1/31	1/18-1/22	1/17	N/A
1099-Q Coverdell ESA	1/31	1/26	1/20	N/A
1099-SA	1/31	1/26	1/20	N/A
1099-DIV/ 1099-B*	2/15	1/31-3/15	1/31-3/15	2/7
1042-S	3/15	3/15	3/8	N/A
5498-ESA	5/31	4/21	4/25	N/A
5498	5/31	5/30	5/11	N/A
5498-SA	5/31	5/11	5/11	N/A

*For Victory Funds accounts, the target mail by date is 2/13 for 1099-DIV/1099-B tax forms and the estimated online availability is 2/7. For Marketplace accounts, 1099-DIV/1099-B tax forms are subject to phased mailing dates (1/31, 2/15, 2/29 and 3/15). TurboTax downloads not available for Marketplace accounts. Please refer to our [Marketplace FAQs](#) for more details.

If any date falls on Saturday, Sunday or a legal holiday, the date is the next business day.

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