



Tax deadline

APRIL 18, 2023



Get your statements faster

To view your tax forms and statements, please log into your online banking account at selfreliance.com or through your mobile banking app. If you receive paper statements, tax statements will be mailed to you when they are available online.



Protect yourself from fraud

- Turn on transaction alerts
- Keep your contact info up to date so you receive important account information
- Monitor your accounts using the Selfreliance mobile app or online banking any time any place.



January 31, 2023

Statements from your financial institution:

- 1099-INT: For members who earned \$10 or more on dividends. You can see total dividends paid out to you in 2022 on your December 2022 statement. Members who earn less than \$10 in dividends are not reported to the IRS.
- 1099-R: If you received a distribution of \$10 or more from your retirement plan (IRAs).
- 1099-Q: For members who have made withdrawals from their Coverdell educational savings accounts (ESAs).
- 1098- For members who have a mortgage or a loan that is secured by a property and paid \$600 or more in dividends in 2022.
- 1099-MISC- For members who have received miscellaneous income of \$600 or more in dividends.
- 1099-C: Nearly any debt you owe that is canceled, forgiven or discharged becomes taxable income to you.

Forms to expect from your employer:

- Deadline for employers to mail out W-2 Forms to their employees and for businesses to furnish 1099 Forms reporting non-employee compensation.



March 15, 2023

- Form 1120-S for S-corporations and Form 1065 for partnership returns are due for entities operating on a calendar year.



April 18, 2023

Last day to make IRA contributions / Tax Day

- The 2022 annual contribution limit for IRAs is \$6,000 per eligible individual. Those aged 50+ can make additional catch-up contributions of up to \$1,000 (\$7,000 total contribution). For more information, please visit the [IRS dedicated resources](#).
- Individual Income Tax Returns, Form 1040, Form 1120 for C-corporation returns.
- And if you file for an extension, [Form 4868](#).



May 31, 2023

The following forms are due from your financial institution

- Due date for furnishing 5498 (Traditional, Roth, and SEP IRA contributions) and 5498-ESA Education Savings Account Contributions.



September 15, 2023

- Partnership and S corp tax deadline for those that received a filing extension.



October 16, 2023

- Deadline for 2022 individual, sole proprietor, and C corp tax returns that received a filing extension.