WASHINGTON TRUST
Wealth Management®

January 2022

RE: Important 2021 Tax Information Delivery Schedule

The 2021 Tax Information Delivery Schedule is being provided to inform you of when to expect tax documents for your Washington Trust Wealth Management account(s).

Depending on the types of accounts that you have with us, we are required to file on or more of the following tax documents with the Internal Revenue Service and provide you with a copy of each:

TAX FORM	TYPE OF ACCOUNT	ESTIMATED TAX INFORMATION DELIVERY SCHEDULE
Form 1099-R Form 1099-NEC	**Individual Retirement Account (IRA) Non-Employee Compensation**	**January 31, 2022**
Form 1099 (consolidated)	**Investment Management or Custody**	**February 10 – February 15, 2022 (includes IRS-approved extension for 1099 mailings)**
Grantor Tax Information Letter	**Grantor Trust**	**February 10 – February 15, 2022**
Form 1041 Schedule K-1	**Trusts (non-grantor)**	**February 10 – March 15, 2022**

The estimated delivery schedule of these documents may be delayed by the types of investments held within each account during the 2021 tax year. Examples of investments that may affect the delivery schedule are:

- REMICs (Real Estate Mortgage Investment Conduits), MBS (Mortgage-Backed Securities), Royalty Trusts, REITs (Real Estate Investment Trusts), WHFITs (Widely Held Fixed Investment Trusts), Master Limited Partnerships and Exchange Traded Funds (structured as limited partnerships).

If you have any questions, please contact your Wealth Management Account Officer.