

January 2025

RE: Important 2024 Tax Information Delivery Schedule

The 2024 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 one or more of the following tax documents with the Internal Revenue Service and provide you with a copy as applicable:

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, 2025
Form 1099 (consolidated)	Investment Management or Custody	February 10 – February 15, 2025 (includes IRS-approved extension for 1099 mailings)
Grantor Tax Information Letter	Grantor Trust	February 10 – February 15, 2025
Form 1041 Schedule K-1	Trusts (non-grantor)	February 10 – March 15, 2025

The estimated delivery schedule of these documents may be delayed, depending on the types of investments held within each account during the 2024 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.

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