

# Wagner Planning

ENVISION • PLAN • ACHIEVE

January 7<sup>th</sup>, 2026

Dear Client,

We are honored and humbled by the opportunity to serve you this past year. Thank you for your trust and confidence to help you reach your financial goals. We work hard to improve your financial life and our focus on planning is to give you the clarity you need to make those complex financial decisions.

With tax season approaching, here is some helpful information. The 2025 tax form 1099R for retirement distributions will be available online or sent by mail beginning January 28<sup>th</sup>. If you have taxable investment accounts, your form 1099 will be mailed or available online no later than March 11<sup>th</sup> to reduce the need for revisions.

We recommend logging in to your online access and reviewing your e-delivery preferences prior to delivery of tax documents. Click links for step-by-step instructions to [download](#) or [import](#) your tax information. Please contact your tax preparer at your earliest convenience and let us know if our office can assist in any way.

If you are eligible to make retirement plan contributions and would like to make a prior year contribution, please let us know in advance so we can prepare the required paperwork. You should confirm with your tax preparer regarding your contribution deadline and limits, as these can vary.

All the best for 2026!

Sincerely,

Sandra J. Wagner, CFP®  
President & CEO

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