



Note: *The draft you are looking for begins on the next page.*

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Most forms and publications have a page on IRS.gov: [IRS.gov/Form1040](https://www.irs.gov/Form1040) for Form 1040; [IRS.gov/Pub501](https://www.irs.gov/Pub501) for Pub. 501; [IRS.gov/W4](https://www.irs.gov/W4) for Form W-4; and [IRS.gov/ScheduleA](https://www.irs.gov/ScheduleA) for Schedule A (Form 1040), for example, and similarly for other forms, pubs, and schedules for Form 1040. When typing in a link, type it into the address bar of your browser, not a Search box on IRS.gov.

If you wish, you can submit comments to the IRS about draft or final forms, instructions, or pubs at [IRS.gov/FormsComments](https://www.irs.gov/FormsComments). Include “NTF” followed by the form or pub number (for example, “NTF1040”, “NTFW4”, “NTF501”, etc.) in the body of the message to route your message properly. We cannot respond to all comments due to the high volume we receive and may not be able to consider many suggestions until the subsequent revision of the product, but we will review each “NTF” message. If you have comments on reducing paperwork and respondent (filer) burden, with respect to draft or final forms, please respond to the relevant information collection through the Federal Register process; for more info, click [here](#).

TREASURY/IRS AND OMB USE ONLY DRAFT

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☐ VOID

☐ CORRECTED

TRUSTEE'S name				1 Pilot program and qualified general contributions	OMB No. 1545-0747
Street address			Room/suite no.	\$	Form 5498-TA
City/town	State/province	Country	ZIP/foreign code	2 Qualified rollover contributions	(December 2026)
				\$	For calendar year
TRUSTEE'S TIN		BENEFICIARY'S TIN		3 Section 128 employer contributions	4 Other contributions
BENEFICIARY'S name				\$	\$
Street address			Apt. no.	5 Basis or investment in the contract	6 FMV of account
City/town	State/province	Country	ZIP/foreign code	\$	\$
Account number (see instructions)					

Trump Account
Contribution
Information

Copy A
For
Internal Revenue
Service Center

For filing information,
Privacy Act, and
Paperwork Reduction
Act Notice, see the
General Instructions
for Certain
Information Returns.

www.irs.gov/Form1099

Form **5498-TA** (12-2026) Created 3/31/26 Cat. No. 95947G www.irs.gov/Form5498TA Department of the Treasury - Internal Revenue Service

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Trump Account Contribution Information

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For Beneficiary

This information is being furnished to the IRS.

Form **5498-TA** (12-2026)

(Keep for your records)

www.irs.gov/Form5498TA

Department of the Treasury - Internal Revenue Service

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Instructions for Beneficiary

The information on Form 5498-TA is furnished to you by the trustee of your Trump account. Form 5498-TA reports contributions, rollovers, basis or investment in the contract, and the fair market value (FMV) of the account for the calendar year shown on this form. For more information about Trump accounts, see Pubs. 590-A and 590-B.

Beneficiary's taxpayer identification number (TIN). For your protection, this form may show only the last four digits of your TIN (social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN)). However, the trustee has reported your complete TIN to the IRS.

Account number. May show an account or other unique number the trustee assigned to distinguish your account.

Box 1. Shows the amount of pilot program and qualified general contributions made to this Trump account in the calendar year shown on this form.

Box 2. Shows the amount of qualified rollover contributions made to this Trump account in the calendar year shown on this form.

Box 3. Shows the amount of section 128 employer contributions made to this Trump account in the calendar year shown on this form.

Box 4. Shows the amount of other contributions (excluding pilot program, qualified general, qualified rollover, and section 128 employer contributions) made to this Trump account in the calendar year shown on this form.

Box 5. Shows the basis or investment in the contract.

Box 6. Shows the FMV of the Trump account as of the end of the year.

Future developments. For the latest information about developments related to Form 5498-TA and its instructions, such as legislation enacted after they were published, go to www.irs.gov/Form5498TA.

Free File Program. Go to www.irs.gov/FreeFile to see if you qualify for no-cost online federal tax preparation, e-filing, and direct deposit or payment options.

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