

MEMO# 33918

November 23, 2021

Member Survey: REIT Year-End Tax Reporting Information

[33918]

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TO: Bank, Trust and Retirement Advisory Committee

Broker/Dealer Advisory Committee

Closed-End Investment Company Committee

Tax Committee

Transfer Agent Advisory Committee RE: Member Survey: REIT Year-End Tax Reporting Information

Nareit has informed us that it no longer will publish on its website the year-end reporting layouts of its member real estate investment trusts (REITs). To the extent available, Nareit will publish links to member REITs' press releases or website pages regarding tax treatment of 2021 distributions. To ensure that funds receive REIT tax information for 2021, Nareit has asked that we provide them with the source(s) that you use for this information. Nareit will make available to its members a comprehensive list that it develops of the parties, including funds and vendors, who, for tax reporting purposes, have requested REIT reporting layout information.

This [survey](#) asks only two questions. Individual firm responses to this survey will be maintained as confidential. We will merely provide Nareit with the names of parties that, for tax reporting purposes, should be placed on the distribution list for Nareit's member use. We are requesting the name and contact details for respondents for any necessary follow up.

Survey responses are requested by close of business on December 3, 2021. Please contact Katie Sunderland by email (katie.sunderland@ici.org) if you have any substantive questions regarding this survey or Jean Zadeh by email (jean.zadeh@ici.org) if you have any technical difficulties.

Katie Sunderland
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