

# HARTFORDFUNDS

Our benchmark is the investor.<sup>SM</sup>

## IMPORTANT YEAR-END TAX INFORMATION

The following information should be used in conjunction with the preparation of your 2023 tax return as the owner of a **Coverdell Education Savings Account**.

- As noted in the instructions for **Form 1099-Q**, Hartford Funds is not required to include earnings (other than earnings on excess contributions) and basis in **Boxes 2 and 3**. This information must still be reported when filing your taxes.
- To calculate your earnings and basis, use the Coverdell ESA-Taxable Distributions and Basis Worksheet in IRS Publication 970, which can be found at [www.irs.gov](http://www.irs.gov) or by calling the IRS at (800) 829-1040. The total value of your account is the value reflected on your 12/31/2023 statement and is shown on your Form 1099-Q below Box 6 as the fair market value (FMV).

The information provided in these materials has been included for your reference and is not intended to be all inclusive.

**For specific tax questions, please consult your tax professional. Hartford Funds does not offer tax advice. Shareholders should consult a tax professional for additional information.** This information is provided for informational purposes only. If you have other questions about your tax information, please call a service specialist at (888) 843-7824. Office hours are 9 a.m. to 6 p.m. Eastern Time.

Additional information is available on our website at [www.hartfordfunds.com](http://www.hartfordfunds.com)