

**From:** Louis Coglianese  
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### **Mutual Funds Year-End Capital Gains Distributions topic for Forum 11/29/2023**

Here [are] some websites I monitored when I had mutual funds in a taxable account. I checked at least weekly in November and December when I wanted to know the distribution amount before it occurred. If you go searching via Google, remember to add 2023 to your search query as you will otherwise get results from 2022 and earlier.

1. Fidelity's 2023 list of mutual funds that have had or are soon to have distributions. For upcoming distributions, funds are added to the list only a few days or weeks before the distribution date. <https://www.fidelity.com/mutual-funds/information/distributions#/?table=actuals>
2. Vanguard's lists [of] past and projected distributions: <https://advisors.vanguard.com/tax-center/tax-season-calendar/current-year>
3. You can search for your fund or fund family at [www.capgainsvalet.com](http://www.capgainsvalet.com)
4. Also it's rare but not impossible to get a distribution from an ETF. Here's a short list from iShares: <https://www.ishares.com/us/capital-gains-distributions>
5. Various warnings:
  - Barrons by Lewis Braham: *Your Mutual Fund Could Deliver an Unexpected Tax Hit. How to Prevent It.* <https://www.barrons.com/articles/unexpected-taxes-could-hit-mutual-fund-investors-heres-how-to-avoid-them-edd5d5ac>
  - Morningstar
    - Steven Welch: *Which Popular Funds Could Hand Their Shareholders Big Tax Bills?* <https://www.morningstar.com/funds/which-popular-funds-will-hit-investors-with-big-capital-gains-distributions-this-year>
    - Christine Benz: *A Rundown of Impending Mutual Fund Capital Gains Distributions* <https://www.morningstar.com/funds/rundown-impending-mutual-fund-capital-gains-distributions>
6. Finally, I did a presentation on this topic a couple of years ago. Go to the Financial Forum member contributions website <https://olligmu.org/finforum/contrib.html>. The scroll down to *Dec 1, 2021 - Lou Coglianese: "Estimating year end mutual fund distributions" presentation PDF file*. [Direct link: [https://olligmu.org/finforum/pdf/lc\\_211206\\_Estimating\\_Year-End\\_Mutual\\_Fund\\_Distributions\\_presentation.pdf](https://olligmu.org/finforum/pdf/lc_211206_Estimating_Year-End_Mutual_Fund_Distributions_presentation.pdf) ] Note that since this is 2 years old some of the links will not work.

Thanks, Lou Coglianese