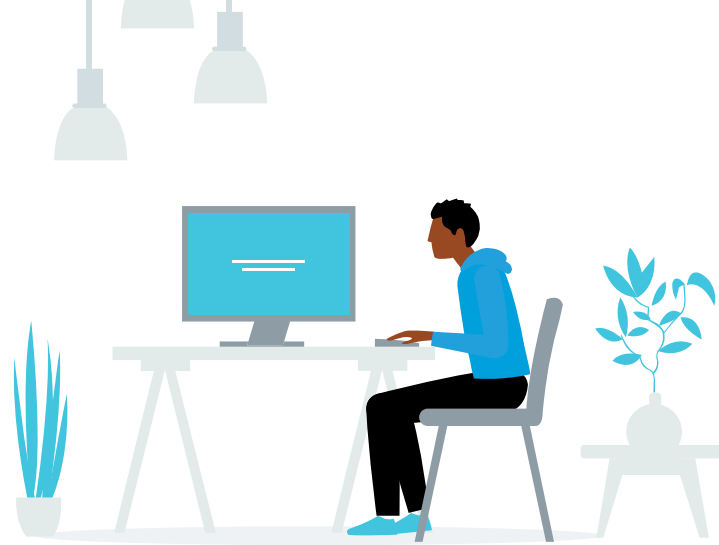




# How to find your tax documents

Follow these instructions to learn how to find your tax documents.



## Key term

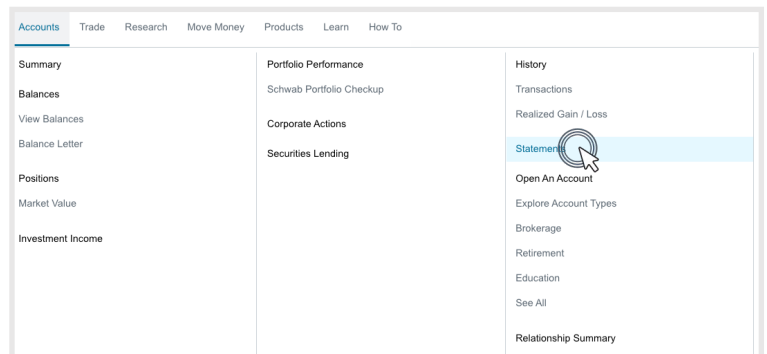


### 1099 form

A 1099 tax form is used to report income received from sources other than an employer.

## Get started

Log in to your account. Click “Accounts” and then select “Statements.”

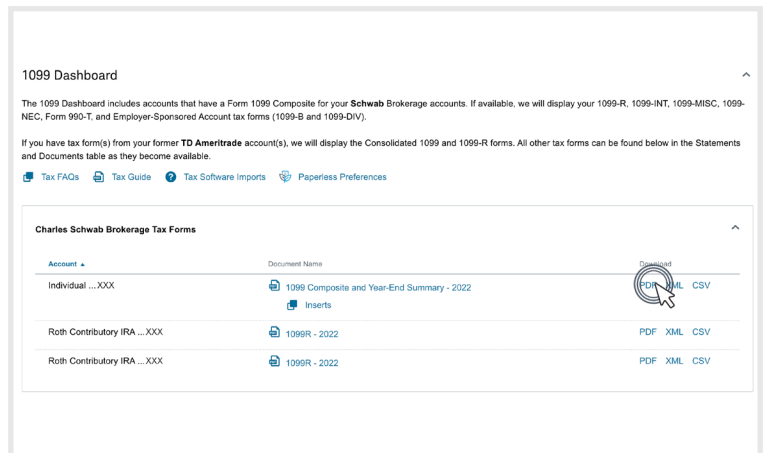


## Step 1

During tax season you will see the 1099 Dashboard which offers a convenient view of your tax forms for the current tax year.

Click one of the download options from the right column to save the forms you want.

**Note:** If your account was converted in 2023 from TD Ameritrade to Schwab, your Consolidated 1099 and 1099-R forms will also be included on the 1099 Dashboard.



## Step 2

To find additional tax forms, or other documents, use the customizable search feature.

Here you can find forms by adjusting your search according to desired date range and document type.

Date	Type	Account	Document Name	Download
2/10/2023	Tax Forms	Individual ...986	1099 Composite and Year-End Summary - 2022 Inserts	PDF XML CSV
1/7/2023	Tax Forms	Roth Contributory IRA ...859	1099R - 2022	PDF XML CSV
1/7/2023	Tax Forms	Roth Contributory IRA ...859	1099R - 2022	PDF XML CSV
5/18/2022	Tax Forms	Roth Contributory IRA ...859	5498 - 2021	PDF
2/11/2022	Tax Forms	Individual ...986	1099 Composite and Year-End Summary - 2021 Inserts	PDF XML CSV
5/22/2021	Tax Forms	Roth Contributory IRA ...859	5498 - 2020	PDF
2/12/2021	Tax Forms	Individual ...986	1099 Composite and Year-End Summary - 2020 Inserts	PDF XML CSV



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Investment Products: Not FDIC-Insured • No Bank Guarantee • May Lose Value

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