

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."

Accounts Trade Research Move Money Products Learn How To						
Summary	Portfolio Performance	History				
Balances	Schwab Portfolio Checkup	Transactions				
View Balances	Corporate Actions	Realized Gain / Loss				
Balance Letter	Securities Lending	Statement				
Positions		Open An Account				
Market Value		Explore Account Types				
Investment Income		Brokerage				
		Retirement				
		Education				
		See All				
		Relationship Summary				

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.

1099 Dashboard includes accounts that h C, Form 990-T, and Employer-Sponsored A	ave a Form 1099 Composite for your Schwab Brokerage accounts. If available, we will dis ccount tax forms (1099-B and 1099-DIV).	play your 1099-R, 1099-INT, 1099-MISC.
ou have tax form(s) from your former TD Ar I Documents table as they become availabl	neritrade account(s), we will display the Consolidated 1099 and 1099-R forms. All other ta e.	ax forms can be found below in the States
Tax FAQs 🖨 Tax Guide 🕜 Tax S	oftware Imports 🛛 😵 Paperless Preferences	
Charles Schwab Brokerage Tax Forms		
Account .	Document Name	Download
Individual XXX	1099 Composite and Year-End Summary - 2022	PDR ML CSV
	L Inserts	
	1099R - 2022	PDF XML CSV
Roth Contributory IRA XXX		
Roth Contributory IRA XXX Roth Contributory IRA XXX	1 1099R - 2022	PDF XML CSV

Step 2

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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.

tle Range Document Type Select All Last 5 Years Last 5 Y					
3 document(s) found from 3/1 Type	3/2018 to 3/13/2023 Account	Document Name	Download	
2/10/2023	Tax Forms	Individual986	1099 Composite and Year-End Summary - 2022 Inserts	PDF XML CSV	
1/7/2023	Tax Forms	Roth Contributory IRA859	💩 1099R - 2022	PDF XML CSV	
1/7/2023	Tax Forms	Roth Contributory IRA859	🙆 1099R - 2022	PDF XML CSV	
5/18/2022	Tax Forms	Roth Contributory IRA859	🖨 5498 - 2021	PDF	
2/11/2022	Tax Forms	Individual986	1099 Composite and Year-End Summary - 2021 Inserts	PDF XML CSV	
5/22/2021	Tax Forms	Roth Contributory IRA859	5 498 - 2020	PDF	
2/12/2021	Tax Forms	Individual986	1099 Composite and Year-End Summary - 2020 Inserts	PDF XML CSV	

Visit our <u>How To Center</u> for helpful videos and more on managing your account and investing online.

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

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