

ACCESSING YOUR TAX DOCUMENTS

Below, you'll find detailed information on how to access your year-end tax documents from Fidelity and Charles Schwab. Documents are usually available in early to mid-February. Be sure to check back periodically if your documents are not immediately available.

Mobile access: Both Fidelity and Schwab have mobile apps that also allow you to access and download your tax documents. You can download the apps from the app stores on both Apple (iOS) or Google Play (Android).

Paper vs. electronic delivery: You can opt to receive paper tax documents via mail. However, electronic delivery is faster and more convenient for most. You can update your preferences in the account settings on either platform to receive documents.

Fidelity

1. LOG IN TO YOUR FIDELITY ACCOUNT.

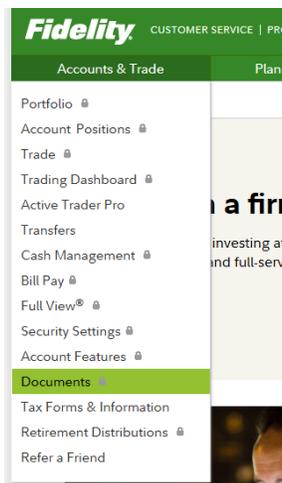
- Open a web browser and go to the Fidelity website: www.fidelity.com
- Click on the “Log In” button at the top right corner of the page.
- Enter your username and password, then click, “Log In.”

2. NAVIGATE TO YOUR TAX DOCUMENTS.

- Hover over or click on the “Accounts & Trade” tab in the top navigation menu.
- Select “Documents” from the drop-down menu.

3. SELECT YEAR-END TAX DOCUMENTS.

- Look for forms such as: 1099 (investment income), 1099-R (retirement account distributions), 1042-S (foreign tax reporting), and any other tax-related documents.
- Click on the appropriate tax form to open and download it.
- Once the tax document is open, you can either click the “Download” button to download it directly or select the “Print” option to print it.



Schwab

1. LOG IN TO YOUR SCHWAB ACCOUNT.

- Open a web browser and go to the Schwab website: www.schwab.com
- Click on the “Log In” button at the top right corner of the page.
- Enter your User ID and password, then click, “Log In.”

2. NAVIGATE TO THE DOCUMENTS SECTION.

- Select “Accounts” → “Statements and Tax Forms” and locate a list of available tax forms.
- Once you have selected and opened the tax document you want, you can either click the “Download” button to download it directly or select the “Print” option to print it.
- Find more information and detailed instructions at <https://www.schwab.com/resource/how-to-find-your-tax-documents>

Date	Type	Account	Document Name	Download
01/24/2025	Tax Forms	Individual...XXX	1099 Composite and Year-End Summary - 2024	PDF
			Inserts	
10/31/2024	Statements	Individual...XXX	Brokerage Statement	PDF
			Regulatory Insert(s)	
10/31/2024	Statements	Individual...XXX	Brokerage Statement	PDF
			Regulatory Insert(s)	
08/31/2024	Statements	Joint Tenant...XXX	Brokerage Statement	PDF
			Regulatory Insert(s)	

Be sure to download all relevant tax forms for your records and review them carefully for any discrepancies. If you notice an error, contact Coldstream immediately for assistance.