How to Access Your Tax Forms

Below you will find easy step by step instructions and useful links for:
Charles Schwab, Fidelity, and Variable Annuities

Charles Schwab

Charles Schwab clients can log in to their accounts directly at client.schwab.com or by clicking "**Log in**" on Schwab.com.
The portal allows users to view, manage, and trade in brokerage or retirement accounts.
New users can register by clicking "**New User**" on the login page.

How to access your tax forms:

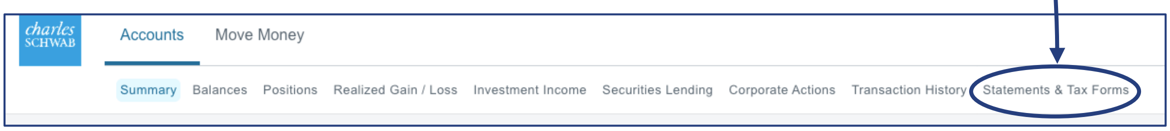
1) **Online via computer, laptop, or web browser on mobile device**:

    a) Navigate to "**Statements & Tax Forms**" in the top display Ribbon

    b) Go to "1099 Dashboard" which is the first displayed

    c) Click drop down arrow for which "account" you would like to view

    d) Click PDF, XML or CSV option for how you would like to download

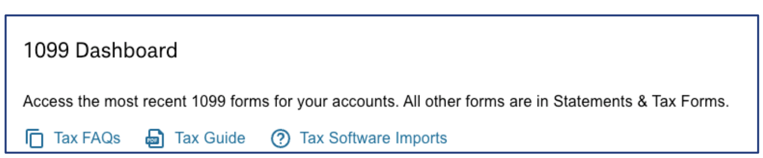


2) **On mobile App:**

    a) Once logged in click the option at bottom of app that displays "**More**" with three dots

    b) Click **1099 Dashboard** under "Dashboards"

    c) You can "**Send**" using the arrow button in top right corner either via email, download or sharing service like Apple AirDrop



Charles Schwab Resources:

- Charles Schwab 2025 Supplementary Tax Information
  The enclosed information may be useful in the preparation of your federal, state, and/or city tax returns
- Schwab Client Learning Center
  - Downloading the Schwab Mobile app
  - Sign up for online access
  - eDelivery
    Convenient, paperless access to up to 10 years of important account information through the security of the Schwab Alliance website in one simple process.

Note for Schwab Clients:

Talk to your advisor

Once your advisor initiates the process, you'll receive an invitation email. Follow the simple instructions to select the eDelivery options that are right for you.

OR

If you prefer to sign up for eDelivery yourself, log in to Schwab Alliance, click on the Profile icon in the upper right corner, and choose Paperless.

Check the box next to each document you would like to receive electronically. You can enroll some or all your documents for eDelivery.

- *Click to watch this video: Learn how to go paperless with Schwab*

Fidelity

Click here for **Tax Information Overview**

Some of your 2025 tax forms may be ready. Documents are usually ready by late January or early February.

To access your Fidelity tax forms, follow these steps:

1. **Log in to your Fidelity account**:
   Use your credentials to access your account on the Fidelity website or mobile app.
2. Navigate to the **Tax Forms & Documents** section:
   Look for the "Tax Forms & Documents" section on your account dashboard.
3. View your tax forms:
   Click on the "**View tax forms**" button to see the status of your tax forms and download them as PDF files.
4. Check for updates:
   Fidelity will send email notifications when your tax forms are available. Ensure your email address is up to date.
5. Contact customer service if needed:
   If you haven't received your tax forms by mid-February, contact Fidelity's customer service for assistance.

Variable Annuities

To find tax forms for **variable annuities**, you can follow these steps:

1. Log in to your online account:
   Access your tax documents by logging into your **online account**.
   (click here for the login page)
2. Check the "**Tax documents section**":
   Navigate to the tax documents section to view and print your tax forms.
3. Request paper copies if needed:
   If you prefer paper copies, contact customer service to specify which products you need forms for and request them.
4. Use the chatbot for **1099-R** requests:
   For annuity tax documents, you can use the chatbot to request a 1099-R by providing your **Contract Number**, **Date of Birth**, and the **last four digits of your Social Security number**.
5. For any questions about your tax documents, customer service can assist with corrections or provide copies if needed, but they cannot offer tax advice.
   For personalized tax advice, it is recommended to consult a tax professional or **financial advisor**.