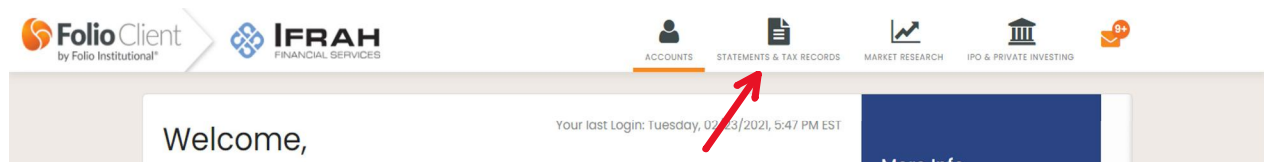


How to Access Tax Documents

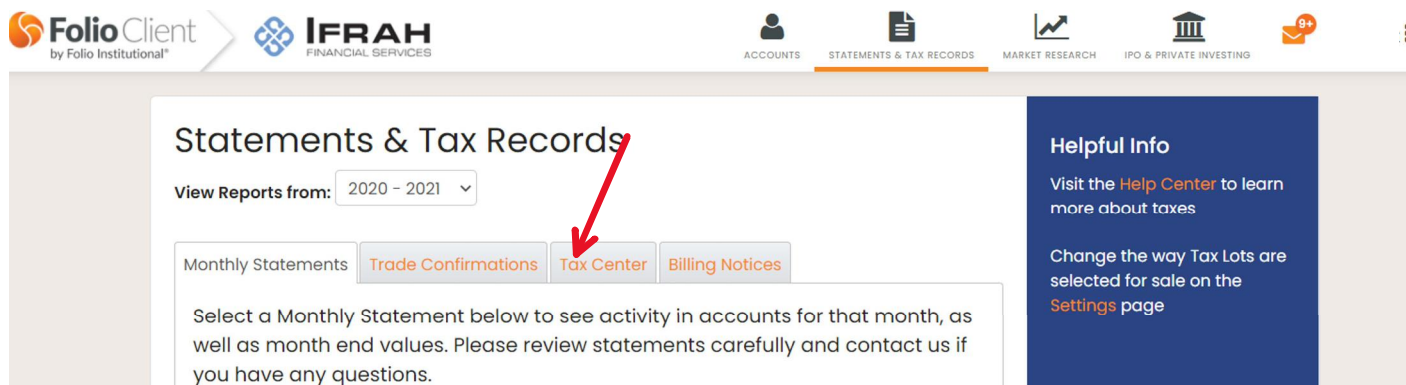
FOLIOfn:

Go to folioclient.com and log in.

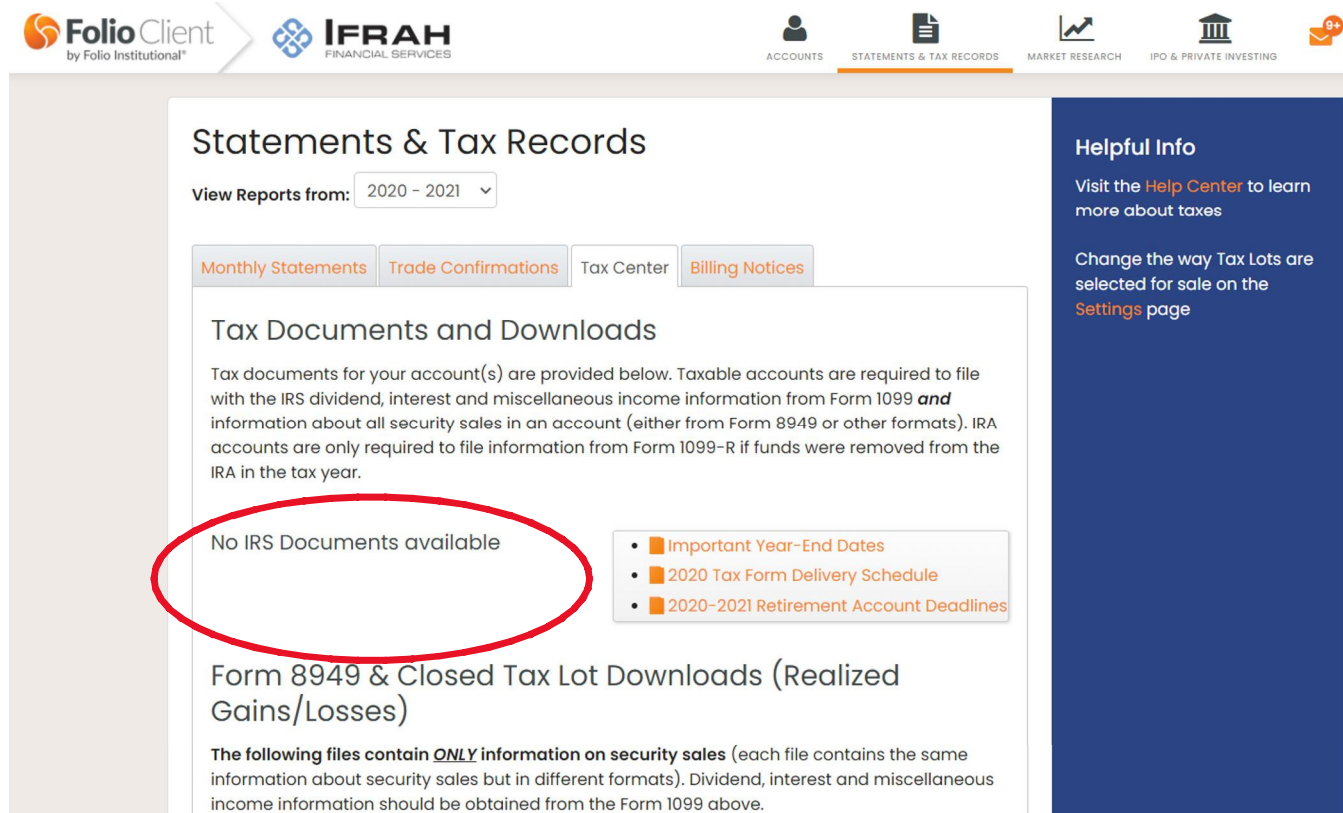
- Once logged in, you will see all the accounts that you have access to listed.
- Look for and click on “Statements & Tax Records” in the banner. This will take you to your document page.



- (If you are on a mobile device, look for and click on the 3 horizontal lines and “Menu” in the top right corner of your browser window.)
- You will see 4 tabs “Monthly Statements,” “Trade Confirmations,” “Tax Center,” and “Billing Notice” Click on Tax Center



- Your 2020 Tax documents are listed on this page. If you click on each document it will be downloaded to your computer.



The following files contain **ONLY** information on security sales (each file contains the same information about security sales but in different formats). Dividend, interest and miscellaneous income information should be obtained from the Form 1099 above.

- **Form 8949** is a PDF file that can be printed and attached to your tax filing