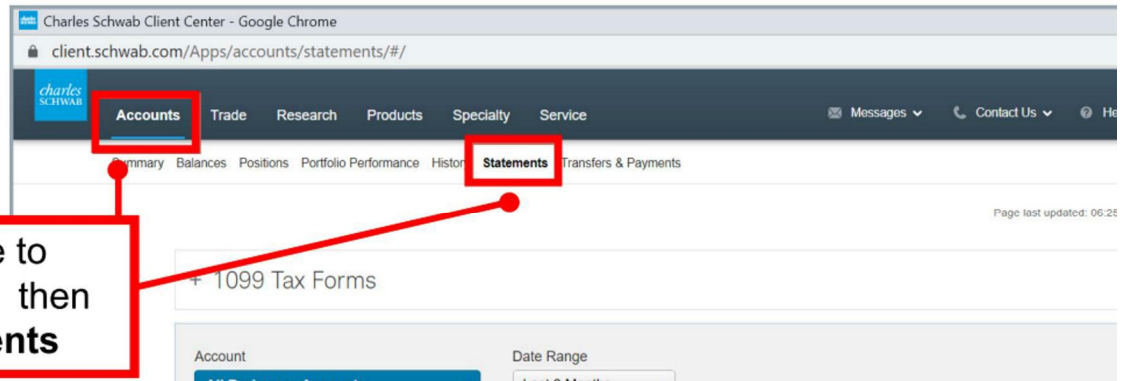


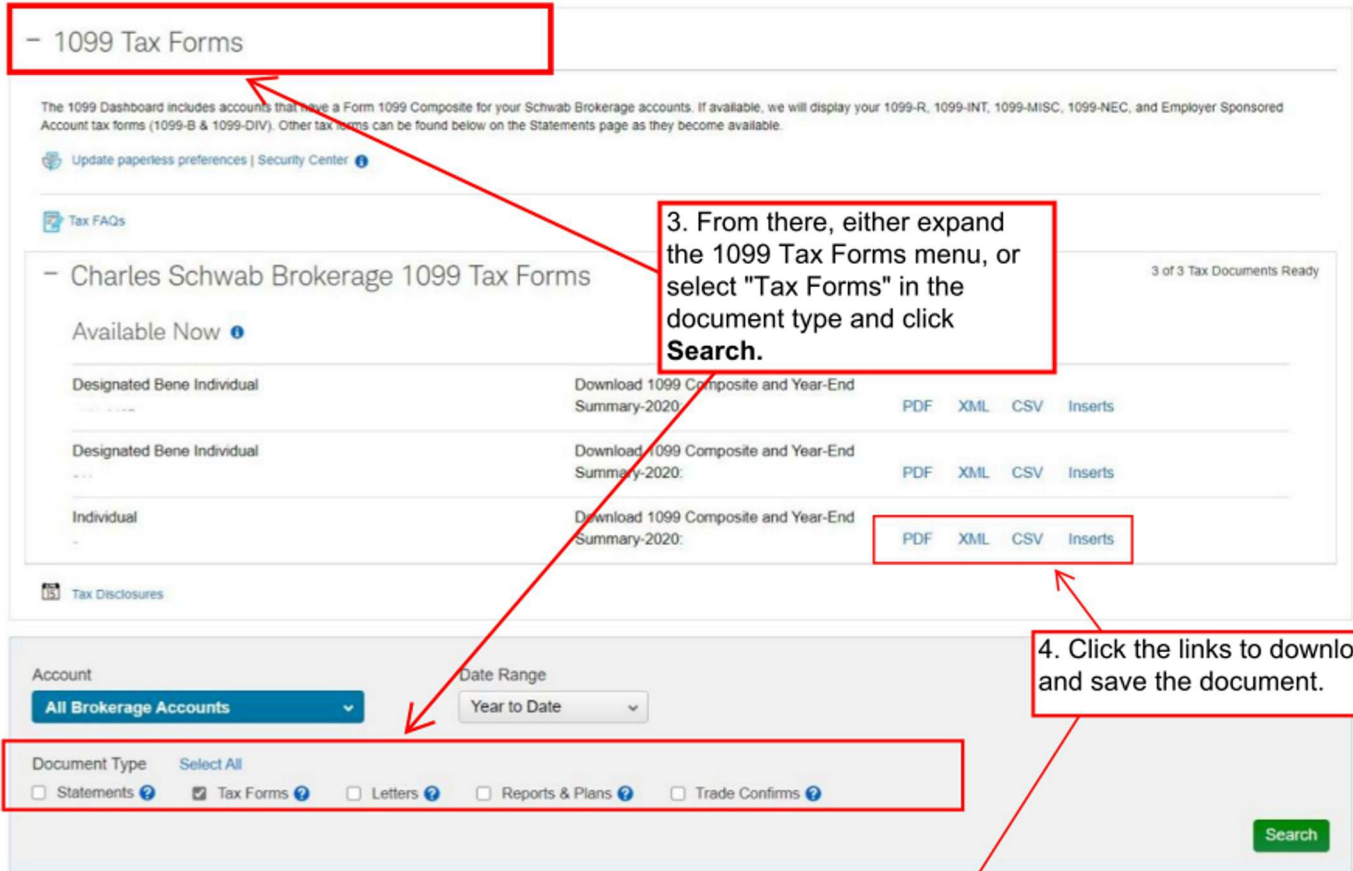
How to Access Tax Documents

Charles Schwab

1. Log on to Schwaballiance.com



2. Navigate to **Accounts**, then to **Statements**



3. From there, either expand the 1099 Tax Forms menu, or select "Tax Forms" in the document type and click **Search**.

4. Click the links to download and save the document.

3 document(s) found from 12/31/2020 to 2/23/2021

Date	Document Type	Account	Document Name	Actions
2/12/2021	Tax Forms	Designated Beneficiary IN	1099 Composite and Year-End Summary-2020	Save XML CSV Inserts
2/12/2021	Tax Forms	Designated Beneficiary IN	1099 Composite and Year-End Summary-2020	Save XML CSV Inserts
2/12/2021	Tax Forms	Individual	1099 Composite and Year-End Summary-2020	Save XML CSV Inserts