



## Tax Documents Available Now!



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### Tax Forms

<input type="checkbox"/>	Name	Portfolio / Account
<input type="checkbox"/>	 2021 1099R – Tax Form - 12312021	Your Account Name

### Instructions for obtaining your 1099/1099R tax documents

1. Login to your online banking
2. Select "Wealth Management"
3. Select "Vault"
4. Select "Statements"
5. Select "Firm Statements" and then "Tax Forms"
6. Select your 2021 tax document to open as a pdf