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Tax Forms

<input type="checkbox"/>	Name	Portfolio / Account
<input type="checkbox"/>	 2022 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 2022 tax document to open as a pdf