



How to find my tax documents

Follow these instructions to learn how to find your tax documents on Schwab.com.



Note: For illustrative purposes only. Screenshots are historical in nature.

Key Terms

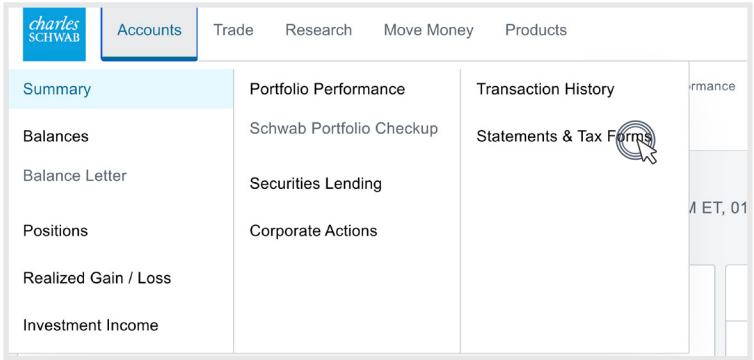


1099 Form

A 1099 tax form is used to report income received from sources other than an employer.

Get started

Log in to your account. Select **Accounts** and then select **Statements & Tax Forms**.

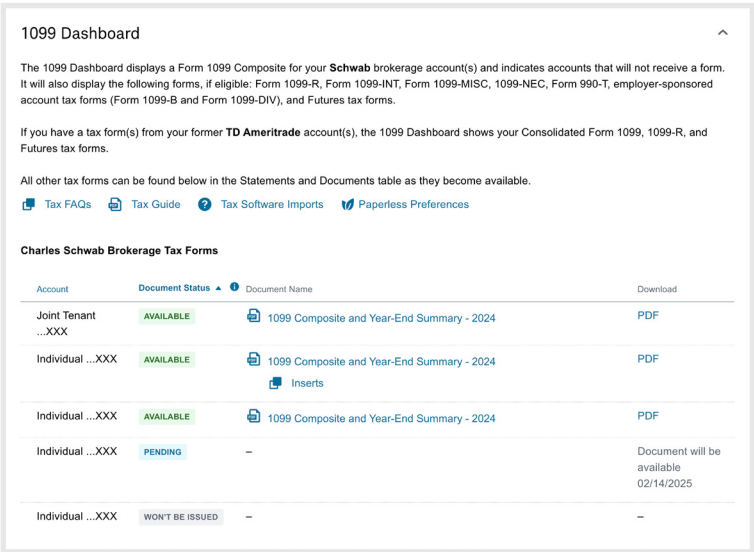


Step 1

During tax season, you'll see the 1099 Dashboard, which offers a personalized view of your tax forms for the current tax year.






Tax forms will appear in the dashboard as they become available; for each form, you'll see a document status of available, pending, or corrected.

Note: If your account was converted in 2024 from TD Ameritrade to Schwab, your Consolidated 1099 and 1099-R forms will also be included on the 1099 Dashboard.



Step 2

Select one of the download options to save the forms you want.

Document Name	Download
 1099 Composite and Year-End Summary - 2024	PDF
 1099 Composite and Year-End Summary - 2024  Inserts	PDF 
 1099 Composite and Year-End Summary - 2024	PDF
—	Document will be available 02/14/2025
—	—

Step 3

To find additional tax forms, or other documents, use the customizable search feature. Here you can find forms by adjusting your search according to desired date range and document type.

Statements and Documents

Date range

Document Types

Last 2 Years

Statements

Tax Forms

Letters

Reports & Plans

Trade Confirms

Search

100 document(s) found from 01/29/2023 to 01/29/2025

Date	Type	Account	Document Name	Download
01/24/2025	Tax Forms	Individual ...XXX	<div>1099 Composite and Year-End Summary - 2024</div> <div>Inserts</div>	PDF
10/31/2024	Statements	Individual ...XXX	<div>Brokerage Statement</div> <div>Regulatory Insert(s)</div>	PDF
10/31/2024	Statements	Individual ...XXX	<div>Brokerage Statement</div> <div>Regulatory Insert(s)</div>	PDF
08/31/2024	Statements	Joint Tenant ...XXX	<div>Brokerage Statement</div> <div>Regulatory Insert(s)</div>	PDF



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