

SCHWAB TAX DOCUMENTS WILL BE POSTED TO YOUR MAM PORTAL

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STEVE McCARTHY
CPA, CFP®,
Owner and Principal
650 610-9540 x 303
steve@mamportfolios.com

*"To locate your Schwab
1099's and 1099R's, please
follow the detailed
instructions in this White
Paper."*

McCarthy Asset Management, Inc. is an independent, fee-only investment advisory firm that has been helping people invest wisely for over fifteen years. Our mission is to help you better understand and improve your financial situation. We specialize in Retirement Planning, Portfolio Management and Tax Planning.

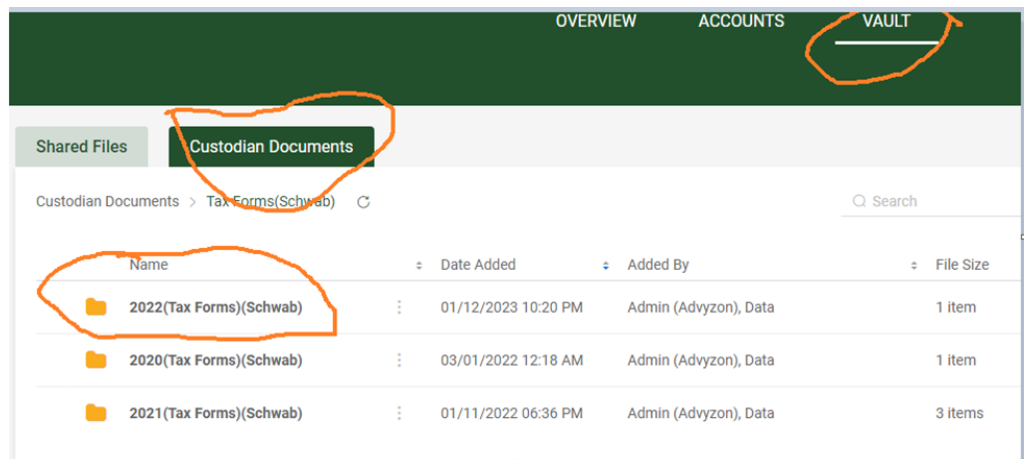


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As some of you already have seen, your Schwab tax documents are being posted to your MAM portal as they become available. This includes Form 1099-Composite for MAM-managed brokerage accounts and Form 1099-R for distributions from MAM-managed retirement accounts.

To access your tax documents:

- 1) Log into your MAM portal.
- 2) Click on "Vault" near the top of the page.
- 3) Click on "Custodian Documents" near the top of the page.
- 4) Click on "Tax Forms (Schwab)".
- 5) Click on "2022 (Tax Forms) (Schwab)".



- 6) You can then select which tax document you want to access.

Timing of When Available: The Form 1099-Rs are available by around the middle of January for the prior year (i.e., 2022 is now available). The 2022 Form 1099-Composite should be posted by the end of February.