



30 JAN 2018

2018 Tax Reporting Statements

Happy New Year! It's that time of year, when thoughts turn from the joys of the holiday season to those of the tax season. Remember, a government "shut down" doesn't shut down the tax collector!

Many clients held accounts at both Morgan Stanley and Charles Schwab during 2018. If you/your family fall into this situation, you will need to access tax reporting statements from both Morgan Stanley AND Charles Schwab for tax year 2018!

For Morgan Stanley Tax Reporting Statements:

If you received documents online, access via <https://login.morganstanleyclientserv.com/ux/>. Navigate to ACCOUNTS then to DOCUMENTS. Choose TAX DOCUMENTS from the drop-down menu.

If you received documents via US Mail, the documents will be mailed to you according to the Morgan Stanley schedule.

For Charles Schwab Tax Reporting Statements:

If you elected to receive tax documents online, access via the Schwab Alliance site at <https://client.schwab.com>. Navigate to ACCOUNTS then STATEMENTS, then choose 1099 DASHBOARD.

If you elected to receive tax documents via US Mail, the documents will be mailed to you according to the Charles Schwab schedule, published in the 1099 DASHBOARD.

Some client households are receiving documents online for certain accounts and via US Mail for other accounts due to some log-in and linking issues. **BE SURE YOU HAVE ALL 1099 DOCUMENTS BEFORE YOU COMPLETE YOUR TAX FORMS!**

Also, please keep in mind that 1099 revisions are possible through the tax season and you could receive an updated 1099—please be patient when filing to ensure accuracy. We are here to help, so please contact us if you need assistance. Thank you for your business.

Sincerely,

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