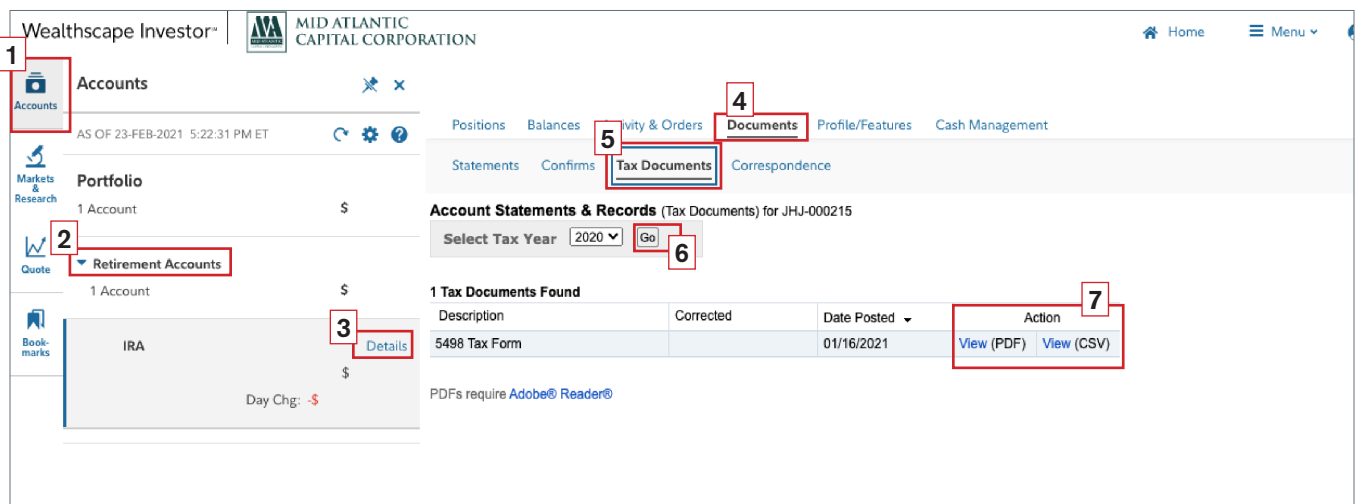


# Wealthscape Investor

## How to locate tax documents

Here are the steps to navigate to the tax documents:

1. Once logged on to Wealthscape Investor, make sure **Accounts** is selected
2. Select dropdown for the account in which you are locating the tax doc
3. Select **Details** (this will open options shown here to the right)
4. Click **Documents**
5. Click **Tax Documents**
6. Select Tax year, and then click **Go**
7. Your tax documents will pull up, if available, for the tax year selected – you can download as a PDF or CSV



The screenshot shows the Wealthscape Investor interface for Mid Atlantic Capital Corporation. The interface is divided into several sections:

- Accounts Section:** Shows a list of accounts. A dropdown menu is open for "Retirement Accounts", and the "IRA" account is selected. The "Details" button is highlighted.
- Navigation Menu:** Includes "Accounts", "Positions", "Balances", "Activity & Orders", "Documents", "Profile/Features", and "Cash Management". The "Documents" tab is selected.
- Sub-Menu:** Includes "Statements", "Confirms", "Tax Documents", and "Correspondence". The "Tax Documents" option is highlighted.
- Account Statements & Records:** Shows "Account Statements & Records (Tax Documents) for JHJ-000215". A "Select Tax Year" dropdown is set to "2020", and the "Go" button is highlighted.
- Tax Documents Found:** A table with one entry:
 

Description	Corrected	Date Posted	Action
5498 Tax Form		01/16/2021	View (PDF) View (CSV)