



When to expect your Schwab 1099 tax form

By Jon Sevenker

Now that 2022 is in the books, the focus turns to gathering the information needed to file your income taxes. You might be wondering when you can expect to receive your Form 1099 from Charles Schwab. Here are several resources to help you keep track of your 1099 readiness.

First, Schwab recently made available a table that shows the mailing dates for various tax forms, including Form 1099. [Click here](#) to view the table.

Second, Schwab provides a [1099 dashboard](#), which offers a quick, personalized way to view the expected availability dates of 1099 composite forms for your eligible brokerage account(s) with taxable activity in 2022. The 1099 Dashboard includes accounts that have a Form 1099 Composite for your Schwab Brokerage accounts. If available, Schwab will display your 1099-R, 1099-INT, 1099-MISC, 1099-NEC, Form 990-T, and Employer Sponsored Account tax forms (1099-B & 1099-DIV).

Third, you can access the 1099 dashboard via the Schwab Mobile App. From the app, click on the More button at the bottom of your screen. Then select Client Service, then click on 1099 Tax Forms. Your 1099s will appear here when they're ready.

A few additional notes about 1099 readiness:

- Forms are typically available by mid-February, but this does depend on the investments held in the account.
- When your account was opened, you selected a delivery method for statements, confirmations, and tax forms. If you selected electronic delivery for these, you won't receive a mailed copy of Form 1099.
- **Diane in our office will upload your 1099 to your P&A Client Portal once it becomes available. So if you don't want to navigate the Schwab website, you can wait for an email about a document being posted to your P&A Client Portal. Documents are available on [Schwab Alliance](#) approximately one week before P&A receives copies.**
- Schwab has delayed the issuance of 1099s the last few years to avoid the need to send out corrected 1099s. A correction occurs when a fund or investment reclassifies a transaction.
- If you'll be using tax preparation software for your taxes, your third-party software provider will need access to your account to directly import your 1099 data. To enable access, visit the Security Center of the Schwab website.

We're here to help, so if you have any 1099-related questions, please contact us.

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