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Accessing Your Tax Information

Bring up our website: www.cascadeinvestors.com

Go to the tab called “Resources”. Click on that tab and you will be directed to our Resources page.

When on that page, go to the middle of the screen. You will see a link called “Login to your Schwab Account” – click on these words and you will be directed to a Schwab login screen.

Once there, enter your login ID and password. If you have never logged in, click on the “new user?” words to the right of the login and it will take you through the process of setting up online access to your account. You will have to answer questions for which only you know the answers.

Remember your login and password for future reference. Go back to the main screen again to log in.

Once you log in, go to your Accounts tab at the top of the screen, click on the “History” word under that tab. Look for your account number from the dropdown menu and select either the **Transactions** tab or the **Realized Gain/Loss** tab to view that data. The “Transactions” tab is where you can access your actual dividend/interest information and the Realized Gain/Loss tab will give you your tax information. If you would like to export this information (to a spreadsheet, or save it in a file), there is a button to do that off to the top right, along with a print button if you would like hard copies. To access statements and reports, go to “Statements” at the top (next to “History”) and again look for your account number from the dropdown menu. Go about halfway down the page to see “Document Type” and “Date Range”. There you can also choose “**Statements**”, “**Tax Forms**”, “**Letters**”, “**Reports and Plans**”, and finally “**Trade Confirms**”. The Statement tab is where you can look up past statements. There is a PDF link off to the right to save in PDF form to your computer. In both the “History” and “Statement” tabs you can put in any date range you need information for.

March 9, 2023