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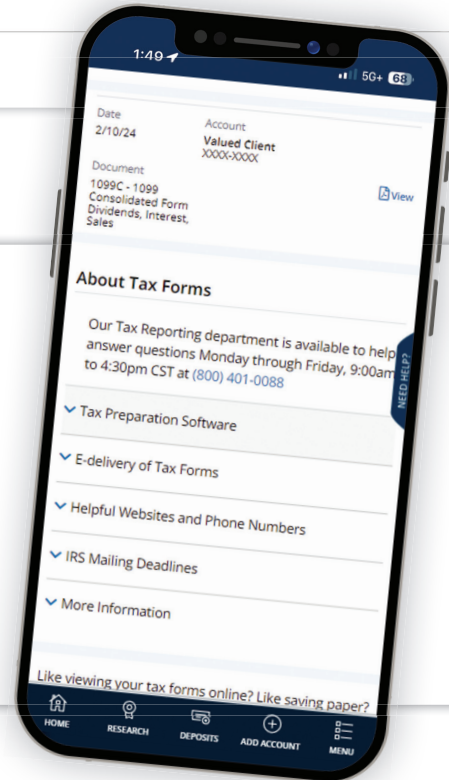
2023 Tax Year ▾

| Date ▾ | Account | Document | |
|---------|----------------------------|--|---|
| 2/10/24 | Valued Client XXXX-XXXX | 1099C - 1099 Consolidated Form Dividends, Interest, Sales | Download View |

About Tax Forms

Our Tax Reporting department is available to help answer questions Monday through Friday, 9:00am to 4:30pm CST at (800) 401-0088

- ▾ Tax Preparation Software
- ▾ E-delivery of Tax Forms



Access Your Tax Documents - Anywhere, Anytime!

Starting mid-January, tax forms will be available and added throughout the tax season. You can access two years of tax forms through Wealth Tracker – the current tax year and the previous year.

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To download tax forms on a desktop, click on the **Download** link next to the appropriate document. On a mobile device, click on the **View** link and follow the steps per your mobile device for download.

Questions?

Contact Stifel Wealth Tracker at (866) 697-8433 or wealthtracker@stifel.com.

Monday – Friday
6:00 a.m. – 7:00 p.m. Central

Saturday
7:30 a.m. – 4:00 p.m. Central



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