



## Obtaining End of Year Documentation

### End of Year Document Mailings:

All tax forms will be postmarked no later than January 31, 2022 as required by the IRS and will be sent to the mailing address listed on the account.

### Mailing Address:

All year-end forms will be sent to the primary mailing address we currently have on record in our systems. If your mailing address is set to go to your accountant or property manager, it may be a good idea to notify them ahead of time. Unfortunately, we are not able to designate a separate address for year-end statements.

### Access to Statements via Online Banking:

Access to year-end statements and tax documents are available only for the primary user's tax ID. To access your tax documents via Online Banking:

1. From the navigation menu under the **Accounts** heading, click on **View Statements and Notices**.
2. Scroll down to the bottom of the page to find your documents under the section titled **Year End Notices**.
3. If a document is available, click on the view icon to open your document online.

YEAR END NOTICES					
					SEARCH
ACCOUNT	DESCRIPTION	DELIVERY	DATE	VIEW	PAPERLESS
IRS Form 1099-INT	IRS Form 1099-INT	Electronic	01/01/2021		
IRS Form 1099-SA	IRS Form 1099-SA	Electronic	01/01/2021		
IRS Form 5498-SA	IRS Form 5498-SA	Electronic	05/21/2021		
YEAREND HSA STATEMENTS	YEAREND HSA STATEMENTS	Electronic	12/31/2020		

**\*For clients with multiple business entities or owners, you will only see the primary entity documents online. The rest will arrive by mail to the primary address in our records. Please contact your local banker if you have any questions.**