Documents

1) How to find Tax documents, Trade confirmations and Account Statements in the Investall application?

Web Application:

- Tap on the **ACCOUNTS** icon on the left side of your screen
- Select the Account which you want to see the Documents
- Tap on the **DOCUMENTS** tab at top of the screen

Mobile Application:

- Tap on the **ACCOUNTS** icon on the right bottom of your screen
- Select the Account which you want to see the Documents
- Tap on the **HAMBURGER** icon at top right of the screen
- Select **DOCUMENTS** from the options displayed.

2) Tax forms and important dates?

Not all investors will receive a tax form. The activity on an account will have to meet a certain threshold set by the IRS. Each form, listed below, provides general guidelines and issue dates.

Form 1099-R:
Issued by Date: January 31
Form is used to report distributions from IRAs or if there was withholding on the account.

Form 1099-Consolidated (1099-B, 1099-DIV, 1099-INT, and 1099-MISC)
Issued by Date: February 15

Form 1099-B
Form is used to report proceeds from broker and barter exchange transactions if there are sales or redemptions of $0.01 or more, or federal withholding on the sales proceeds.

Form 1099-DIV
Form is used to report dividends and distributions of $10 or more (such as dividends, capital gains, or nontaxable distributions that were paid in stock or cash), $600 or more for liquidation distributions, or federal withholding taxes applied to the dividends.

Form 1099-INT
Form is used to report interest income (including tax-exempt interest) of $10 or more in client accounts or federal tax withholding applied to the interest.

Form 1099-MISC

Form is used to report royalties and substitute dividends or interest of $10 or more in client accounts or federal tax withholding applied to the income. Other income of $600 or more.

Form 1042-S (nonresident aliens and non-US entities)
Issued by Date: March 15
Form is used to report certain US-sourced income received by nonresident aliens or non-US entities and federal tax withholding. It does not include account trading activity. US-sourced/reportable payment generally includes dividends and interest, and income subject to withholding.

Form 5498 (IRA contributions)
Issued by Date: May 31
Form is used to report IRA contribution information if there are individual or rollover contributions to Traditional or Roth IRAs. It's not required for filing taxes.

Note: If any date for a form falls on a Saturday, Sunday, or legal holiday, the IRS deadline is moved to the next business day. At times the IRS may extend the due date for certain filing dates or tax form furnishing dates. Solely at the IRS discretion and not by the reporting agent.

3) Can I receive multiple Tax documents?

Yes, you will receive multiple documents when you have multiple Accounts with Investall.

Example:
Let say if **user A** has Stocks, Crypto and Robo accounts with Investall, then **user A** will receive separate documents for each account.