




Downloading information for 2024 tax reporting

How to download your 2024 tax reporting information into your tax preparation software

In order to access and download your information you will need your **UBS account number** and the **Document ID** located at the top of your UBS tax reporting form. Your UBS account number is your username and the Document ID number is your password.

The example below illustrates where you can find this information on your UBS tax reporting documents.

 UBS UBS FINANCIAL SERVICES INC. 1000 HARBOR BLVD. WEEHAWKEN, NJ 07086 PAYER'S TIN: 13-2638166	Tax Information Account XX 12345	Statement Date: 02/15/2025 Document ID: S700 26S 8354	2024
	JOHN DOE 123 TEST STREET SACRAMENTO, CA 10000 RECIPIENT'S TIN: XXX-XX-6789	Your Financial Advisor: JANE DOE 555-555-5555 Office Code: XX Rep Code: XXXX	

Frequently asked questions

Q1: I want to download my UBS tax data for the first time. How do I sign up?

A1: You don't need to sign up for this service. To download the information, simply use your UBS account number and the Document ID (**without spaces**) located on your tax documents.

Q2: I forgot the user name and password. Can you please reset them?

A2: You don't need a separate username and password—simply use your UBS account number and Document ID (**without spaces**) on your tax document to download your information.

Q3: In the past, I was able to enter one username and password to download all of my tax data. Now, I only see one account. What has changed?

A3: The process now requires a unique ID for each document so the tax download is available for one Form 1099 at a time. Please be sure to enter each UBS account number and Document ID separately.

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