




Downloading information for 2019 tax reporting

How to download your 2019 tax reporting information

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	Tax Information Account XX 12345	Statement Date: 02/14/2020 Document ID: ABCDEFGH 1234	2019
	SAMPLE CLIENT TEST STREET 123 ANYTOWN, CA 10000-1000 PAYER'S TIN: 13-2638166	RECIPIENT'S TIN: XXX-XX-6789	Your Financial Advisor: JANE DOE 555-555-5555 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 user name 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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