



# Downloading information for 2023 tax reporting

## How to download your 2023 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 FINANCIAL SERVICES INC. 1000 HARBOR BLVD. WEEHAWKEN, NJ 07086	Tax Information <b>Account XX 12345</b>	Statement Date: 03/11/2024 CORRECTED Document ID: <b>S700 26S 8354</b>	<b>2023</b>
	JOHN DOE TEST STREET 123 SACRAMENTO, CA 10000	Your Financial Advisor: JANE DOE 555-555-5555  Rep Code: XXXX	
PAYER'S TIN: 13-2638166	RECIPIENT'S TIN: XX-XXX6789		

### 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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