



Schwab One® Account of
DANA JONES
JOHN JONES

Account Number
1111-9999

TAX YEAR 2019
FORM 1099 COMPOSITE
& YEAR-END SUMMARY

Date Prepared: January 11, 2020

Recipient's Name and Address

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Items for Attention

- Schwab provides your Form 1099 tax information as early and as accurately as possible. However, some issuers may provide new information about their securities after the IRS Form 1099 mailing deadline. If Schwab receives updated information from issuers of securities you hold, we are required by the IRS to send you a CORRECTED Form 1099 with changes clearly highlighted. Please plan your tax preparation accordingly.
- You may receive CORRECTED Form(s) 1099 as you hold at least one Widely Held Fixed Investment Trust (WHFIT) security. WHFIT security issuers have until March 15 to send their tax reporting information. If we receive new tax information about your WHFIT security, we'll send you a CORRECTED Form 1099.
- You can also log in to schwab.com/reports to view your documents securely online and visit schwab.com/paperless_services to manage your delivery preferences.
- Please refer to the enclosed insert(s) for additional information.

Important Official IRS Form(s) 1099 Enclosed

The report in this package contains your income tax return documents and year-end summary. Please retain this package for tax preparation purposes.

For tax advice, please consult with a qualified tax advisor, CPA, or financial planner.

To contact Schwab:

If you have any questions or need additional information about your Form(s) 1099 or your year-end summary, please call 1-800-435-4000, 24 hours a day, 7 days a week. We're always here for you.

To contact the IRS:

Tax questions for individuals: 1-800-829-1040
Tax questions for businesses: 1-800-829-4933
To order tax forms or publications: 1-800-829-3676
To pay taxes by credit card: 1-888-272-9829
For additional information and to print forms and publications, visit www.irs.gov.

Please note: Any investment shown in this guide is hypothetical and is not intended to reflect the share price of any existing company. Values and calculations on the report may not be an accurate reflection of the transactions and balances that appear on the report. All figures used are for illustrative purposes only.



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Your Form 1099 Composite may include the following Internal Revenue Service (IRS) forms: 1099-DIV, 1099-INT, 1099-MISC, 1099-B, and 1099-OID. You'll only receive the form(s) that apply to your particular financial situation; please keep them for your records. Please note that information in the Year-End Summary is not provided to the IRS. It is provided to you as additional tax reporting information you may need to complete your tax return.

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