




Downloading tax information for 2015 tax reporting

See what's new for the 2015 tax reporting season

We've made some changes to how you can download your 2015 tax reporting information directly into tax software.

In order to access and download your information, you only need your UBS account number and the Document ID located at the top of your UBS tax reporting form. Your UBS account number replaces your username and the Document ID number replaces your password (if you've used the download feature in previous tax years).

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

 UBS FINANCIAL SERVICES INC. 1000 HARBOR BLVD. WEEHAWKEN, NJ 07086 PAYER'S Federal ID No: 13-2638166	Tax Information Account XX 12345	Statement Date: 02/12/2015 Document ID: 68S11G11031	2015
	Sample Client 123 Main Street Anytown, NY 12345-0001 Recipient's ID No: XXX-XX-1234	Your Financial Advisor John Doe 1 Financial Plaza New York, NY 10001	
Summary Information			
DIVIDENDS AND DISTRIBUTIONS	2014 1099-DIV*	MISCELLANEOUS INCOME	2014 1099-MISC*
1a- Total ordinary dividends (includes line 1b)	3,469.50	2- Royalties	0.00
1b- Qualified dividends	2,057.93	3- Other income	0.00
2a- Total capital gain distributions (includes lines 2b, 2c, 2d)	0.00	4- Federal income tax withheld	0.00
2b- Unrecaptured Section 1250 gain	0.00	8- Substitute payments in lieu of dividends or interest	0.00

Frequently asked questions

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

You don't need to sign up for this service. When you receive your tax documents in the mail or through e-Delivery, use your UBS account number and Document ID on your tax document to download the information. Please note that all Forms are available to download as soon as they are delivered to you with the exception of Forms 1099-R, which can be downloaded in TurboTax and other tax software programs beginning February 12.

2. I forgot the user name and password I used last year. Can you please reset them?

You no longer need a separate username and password—simply use your UBS account number and Document ID on your tax document to download your information.

3. 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 happened?

We have made some changes to this process and now the tax download is available one Form 1099 at a time. Please be sure to enter each UBS account number and Document ID separately.

4. What tax software programs are compatible with UBS?

UBS tax information can be downloaded to Turbo Tax, H&R Block and Tax Form Drop-off (Lacerte).

5. What information will be downloaded in tax software?

Only information from 1099s provided by UBS will be downloaded. If you need W-2 information for the 2015 tax year, please contact your employer.

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