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Accessing Your Tax Information

Bring up our website: www.cascadeinvestors.com

Go to the tab called “Resources”. Click on that tab and you will be directed to our Resources page.

When on that page, go to the bottom left of the screen. You will see a link called “Login to your Schwab Account” – click on these words and you will be directed to a Schwab login screen.

Once there, enter your login ID and password. If you have never logged in, click on the “new user?” words to the right of the login and it will take you through the process of setting up online access to your account. You will have to answer questions for which only you know the answers.

Remember your login and password for future reference. Go back to the main screen again to log in.

Once you log in, go to your Accounts tab at the top of the screen, click on the “History” word under that tab. At this point, you have three options. Look under your account number for these options: **Transactions, Statements and Reports or Realized Gain/Loss**. The transactions tab is where you can access your actual dividend/interest information. The Statement tab is where you can look up past statements and the Realized Gain/Loss tab will give you your tax information. You can put in any date range you need information for. If you would like to export this information (to a spreadsheet, or save it in a file), there is a button to do that off to the right, along with a print button if you would like hard copies.

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