Wealthscape Investor

How to locate tax documents

Here are the steps to navigate to the tax documents:

1. Once logged on to Wealthscape Investor, make sure **Accounts** is selected
2. Select dropdown for the account in which you are locating the tax doc
3. Select **Details** (this will open options shown here to the right)
4. Click **Documents**
5. Click **Tax Documents**
6. Select Tax year, and then click **Go**
7. Your tax documents will pull up, if available, for the tax year selected – you can download as a PDF or CSV