WEST BRANCH CAPITAL

As the year wraps up, it's a good time to review the realized capital gains/losses in your taxable accounts and share the information with your tax advisor *before* the end of the year, so they can determine whether you are required to pay additional taxes as a result. This information can be found on your custodial site (such as Fidelity or Schwab). Custodians send out Form 1099 in January.

How to find your realized gains/losses to date

FIDELITY	SCHWAB
View recent statement, or …	View year-to-date account specifics, or …
Select your non-retirement (taxable) account and select "positions", then "closed positions" to view the realized gain/loss summary year-to-date.	Select "accounts", then the subsection titled "realized gains/losses".

For added security, always use two-factor authentication when accessing your custodial accounts.

If you have questions on end-of-year planning, please reach us at ***(833) 888-0534 x2*** *or* ***info@westbranchcapital.com.***