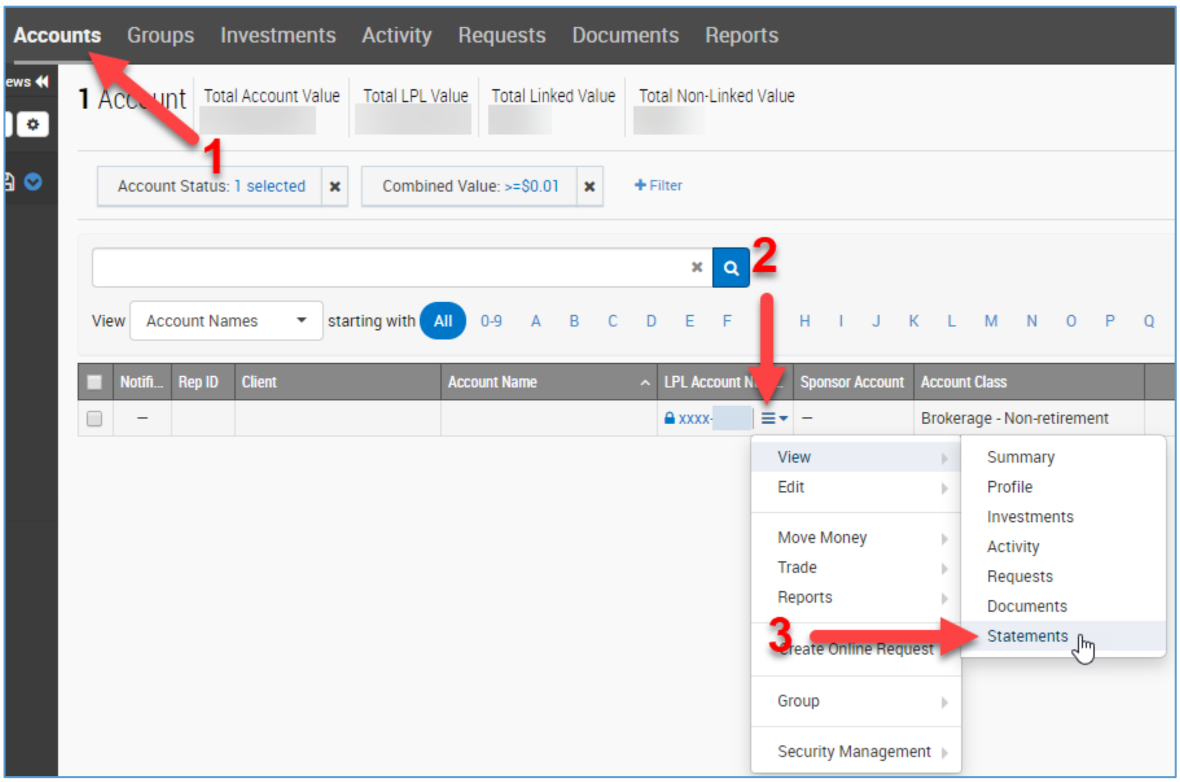
View Preliminary 1099 in ClientWorks & Account View for Tax Statements

As of January 2020

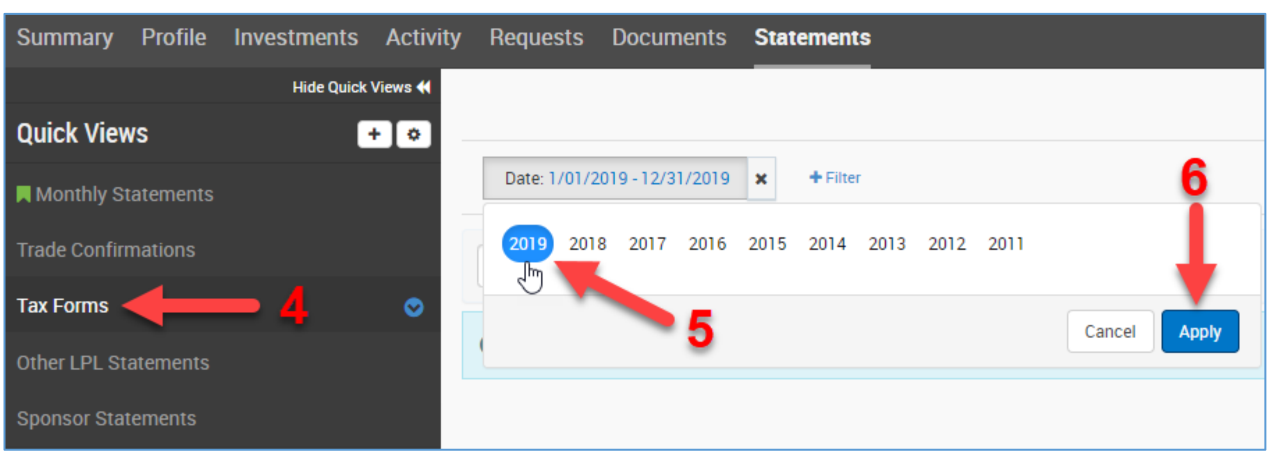
Follow the steps below to view your client's Preliminary 1099 tax statements starting February 20, 2020. The steps below will walk you through how to access the Preliminary 1099 in ClientWorks and Account View. For more information on Preliminary 1099 tax statements refer to 2019/2020 Tax Season Guide available on the Resource Center.

ClientWorks

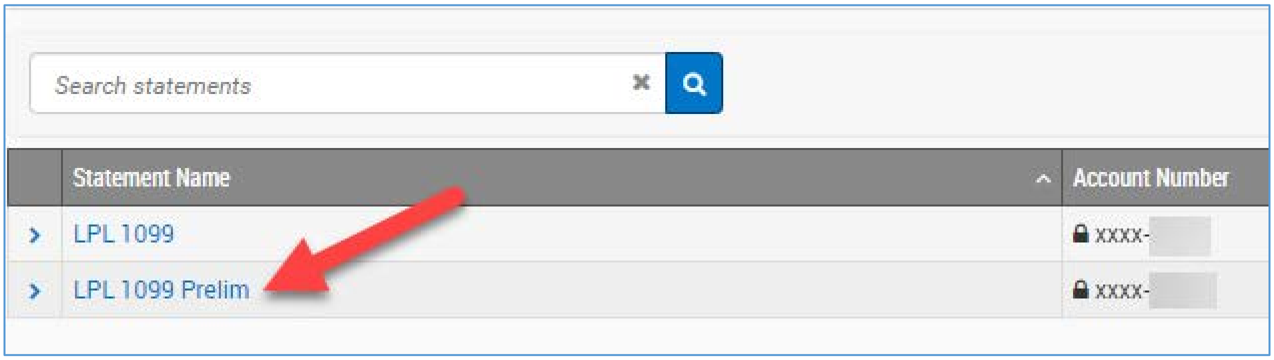
1. From the **Accounts** tab in ClientWorks, select the **account number** > **View** > **Statements**



2. From the Statements tab select **Tax Forms** and adjust the date for the 2019 tax year; click **Apply**
   a. **NOTE** – The year can be adjusted to correspond to the tax year needed

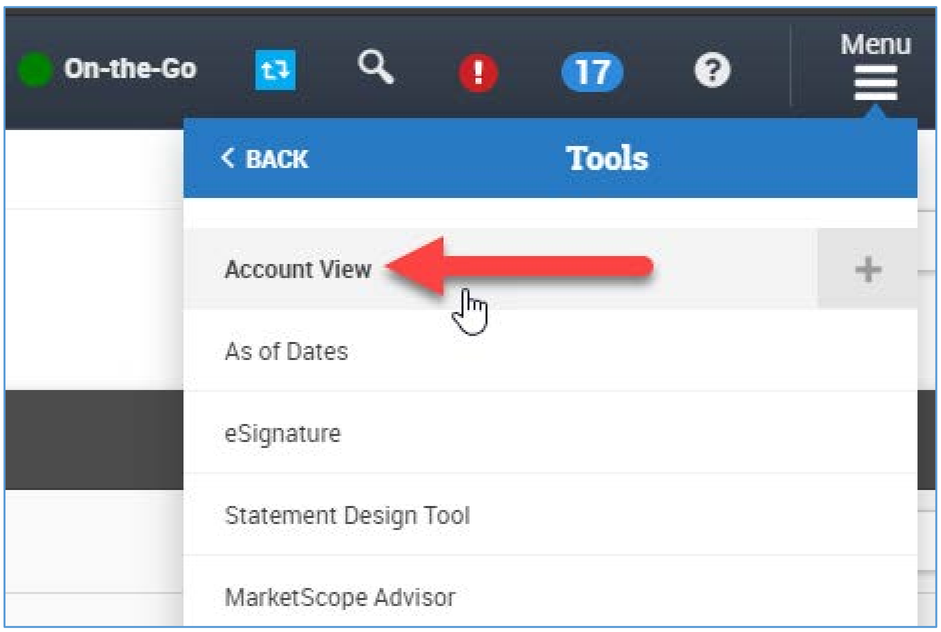


3. Click the hyperlink “**LPL 1099 Prelim**” to access the tax statement. Starting February 20, 2020 the 1099 Preliminary tax statement will be visible.
    a. **NOTE** – Not all clients will receive a Preliminary tax statement. For more information on Preliminary 1099 tax statements refer to 2019/2020 Tax Season Guide available on the Resource Center.

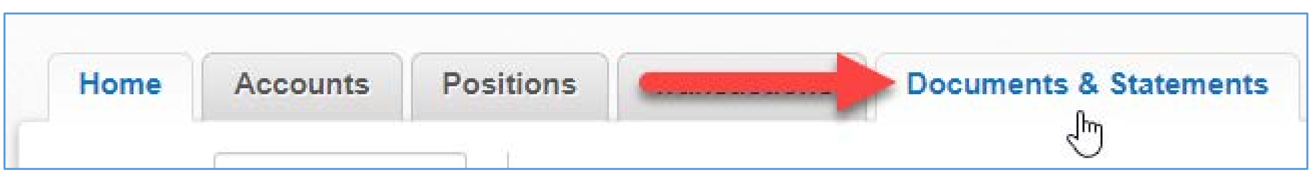


Account View

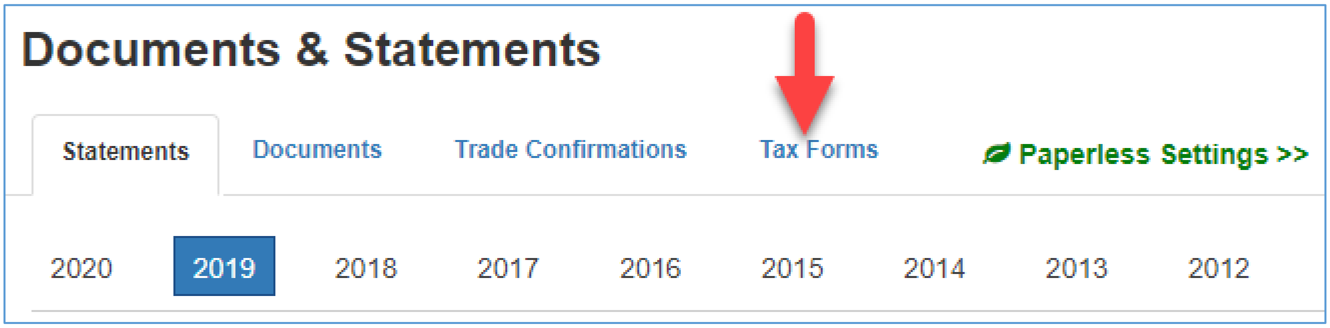
1. From within ClientWorks, access Account View via the **Menu** button in the top-right. Select **Tools** > **Account View**



2. From the client’s account select the **Documents & Statements** tab



3. In Documents & Settings select **Tax Forms**.
    a. **NOTE** – Ensure the correct tax year is selected



4. Click the hyperlink "**LPL 1099 Prelim**" to access the tax statement. The 1099 Preliminary tax statement will be visible in Accounts View starting February 20, 2020