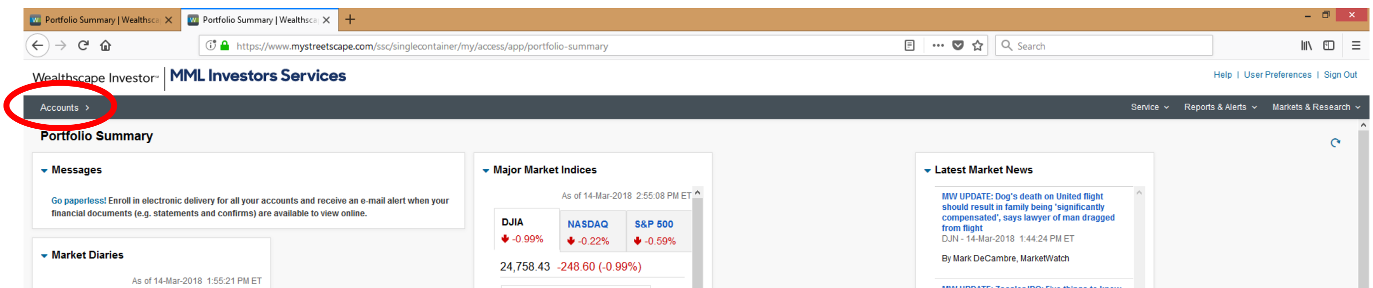
Tax Documents in Wealthscape Investor

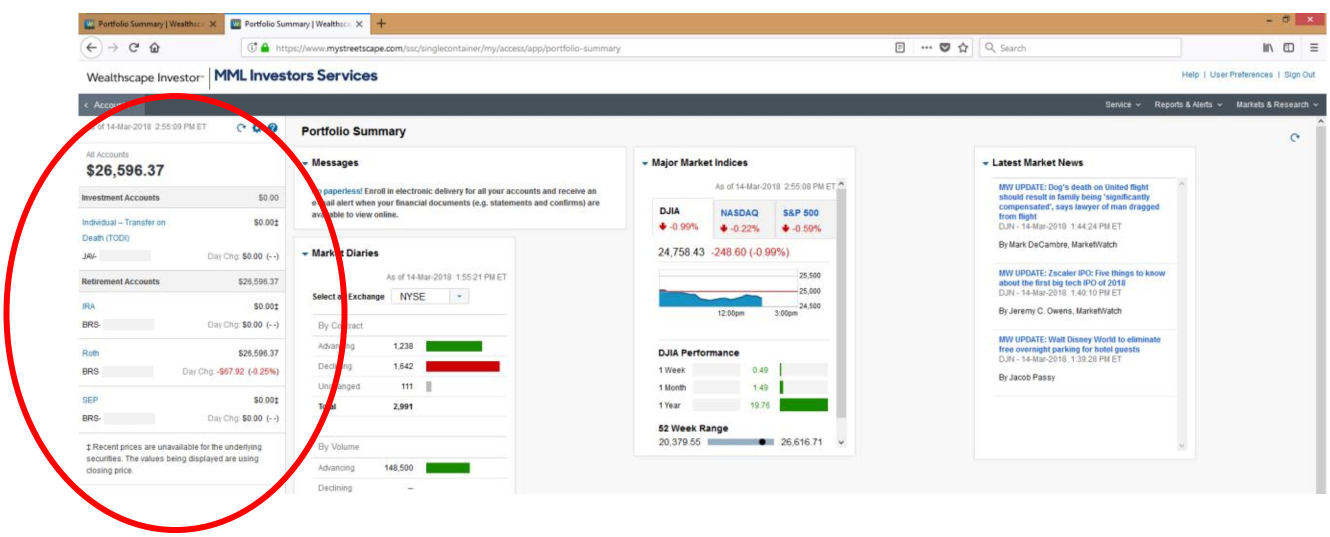
At Triumph Wealth Management LLC, when our clients add an investment account through National Financial Services, they have the ability to view their accounts online. The platform we utilize for this is called Wealthscape Investor. Below are step-by-step instructions on how to find your tax documents on this platform.

1. Log on to https://investor.wealthscape.com/mmlis/investor-index.html. *If you haven't been to this website before, you will need to register first. Please see *Registering for Wealthscape Investor.**

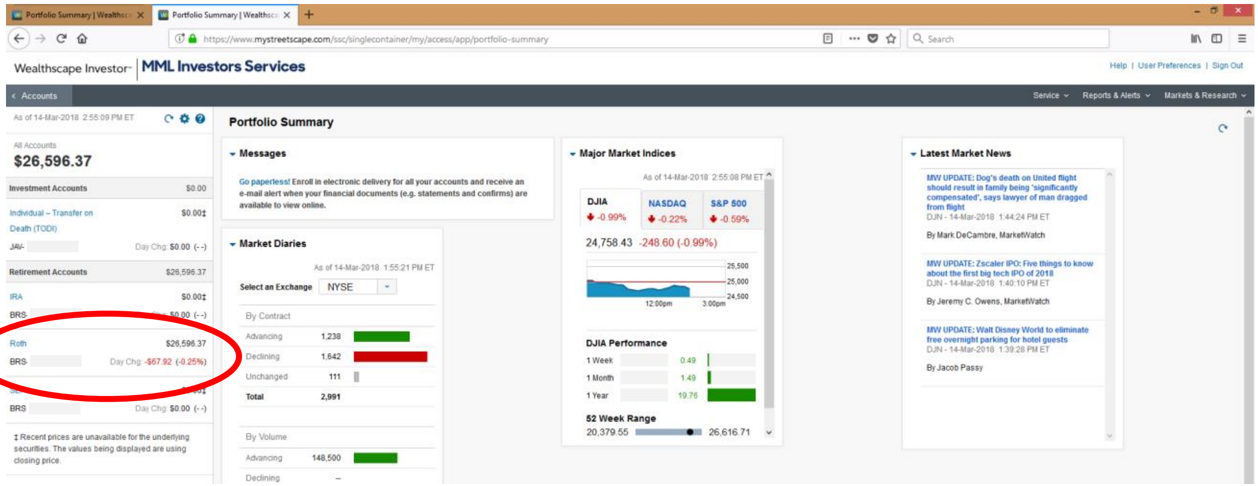
2. Once logged in, the home page will appear. On the left-hand side, you should see "Accounts".



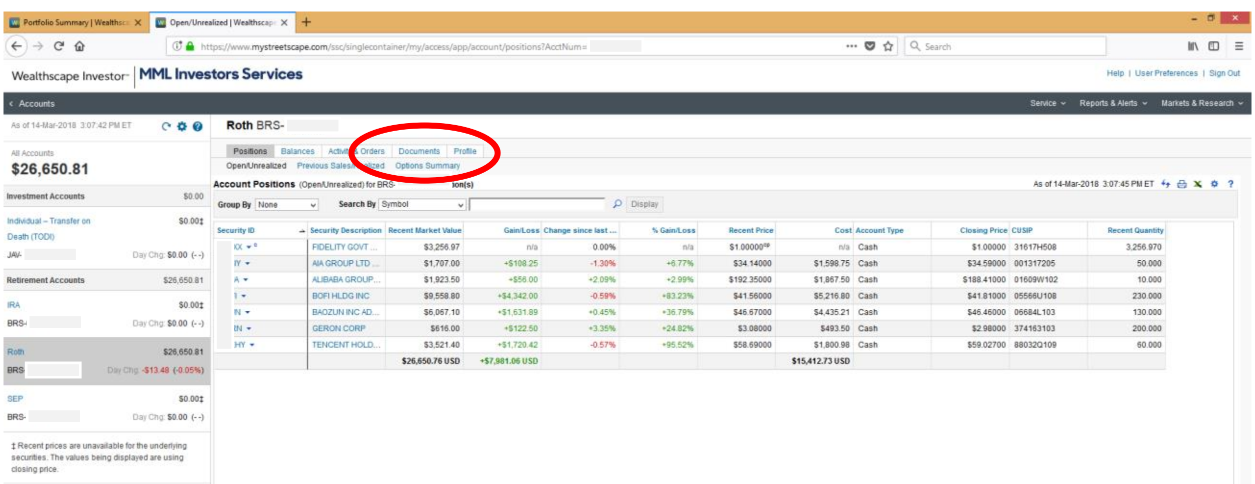
3. Click "Accounts" and a drop-down menu of all your accounts on the platform should appear on the side of the screen.



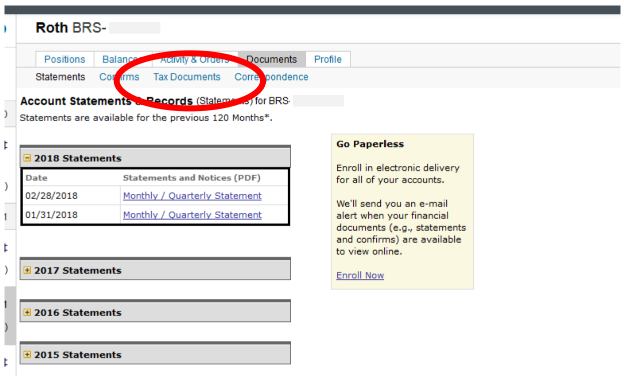
4. If your account has tax documents available, you will have access to them. To get the tax information on each account, select them (one-by-one) in this drop-down menu.



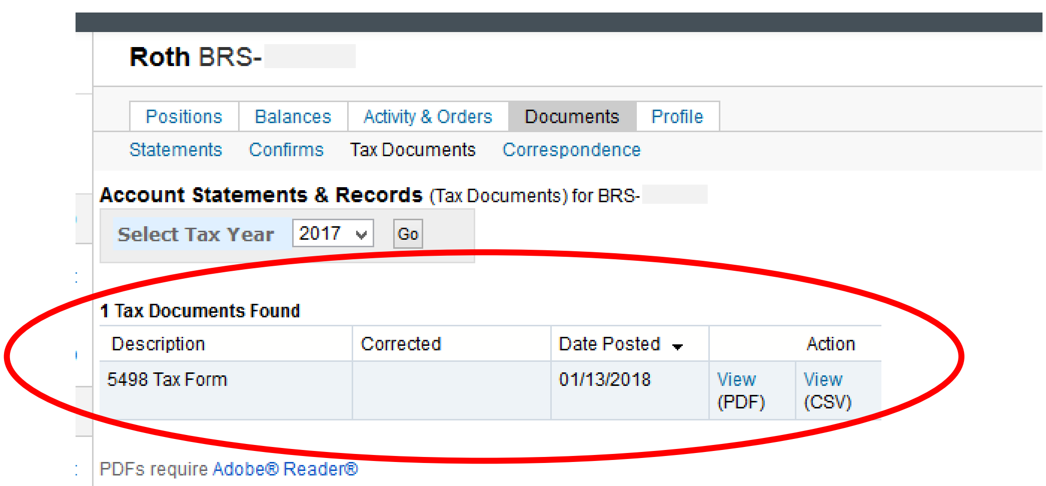
5. The account will open in the center of the page. On the top of this screen, you will see a "Documents" tab. Please select this tab to open a new window.



6. This new window is where you will be able to find your statements, tax documents and more. Please click the “Tax Documents” tab.



7. The new page that opens will show the tax documents that are available for that account. Please note that if there are both preliminary and consolidated version of your documents, that you should use the consolidated version as this is what will go to the IRS.



NOTE: A customized username will not work on the legacy myStreetscape log-in page or mobile app.