

# Best practices for printing Edward Jones tax forms

We work hard to provide you with complete, accurate and timely tax form information, and we want you to be able to see it as clearly as possible. For the best results, follow these suggestions when printing your tax form PDF files from Online Access.

## Ensure PDF reader software is installed on your device

Without PDF reader software, the file will open in your web browser, which can often cause printing issues. PDF reader software is specifically designed to read and print PDF files, so it typically works better than web browsers. We've found our tax forms consistently print best when using Adobe Acrobat Reader. To get your free download, go to [get.adobe.com/reader](https://get.adobe.com/reader).

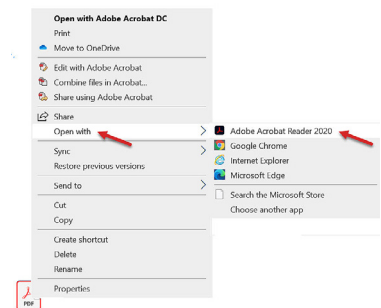
**Optional:** You can automatically open PDF files correctly each time by setting your “default app” for PDF files to your reader software. This option is available in your device’s system settings or control panel.

## Save the PDF file to your computer before printing

This helps ensure the file opens in your PDF reader software and not in your web browser. Follow these steps from within Online Access at the **Documents > Tax Forms** screen:

1. Click the download link and select **PDF**. The PDF file may open in your web browser. That’s fine for now.
2. Save the PDF file somewhere you can easily access it.
3. Close the web browser window containing the PDF file.

4. Right-click the PDF file you saved and select **Open with**.
5. Choose your PDF reader software (e.g., Adobe Acrobat).
6. The file will open in your PDF reader software. Confirm that it has not opened in your web browser.



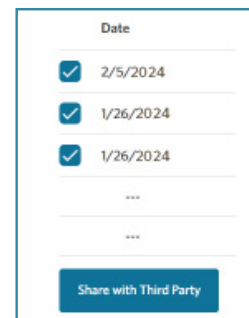
7. Print the document. You may want to quickly review the print preview first to confirm it will print clearly.

## Use print preview if available

Whatever software you are using to print your tax forms, take a moment to look at the print preview feature, if available. If the preview appears to have formatting or other issues, don't print it. Your local team will be happy to print a copy for you or send it electronically to your tax professional if that's what you need.

## Share your tax forms with your tax preparer electronically

If you're printing your tax forms to take them to your tax preparer, consider sharing them electronically through Online Access instead. The process is quick, easy and secure. Simply select the checkbox to the left of the forms you would like to share and click the **Share with Third Party** button to get started. Enter your tax preparer's email address and follow the easy steps. Your tax preparer will receive an email with a link to a secure server and a unique PIN code in a separate email.



| Date                                   |           |
|--|-----------|
| <input checked="" type="checkbox"/>    | 2/5/2024  |
| <input checked="" type="checkbox"/>    | 1/26/2024 |
| <input checked="" type="checkbox"/>    | 1/26/2024 |
| ...                                    |           |
| ...                                    |           |
| <a href="#">Share with Third Party</a> |           |

## Still need assistance?

If you need a printout of your tax form, contact your Edward Jones office for assistance. Associates are available at 800-282-0829 to help with questions about your tax forms.