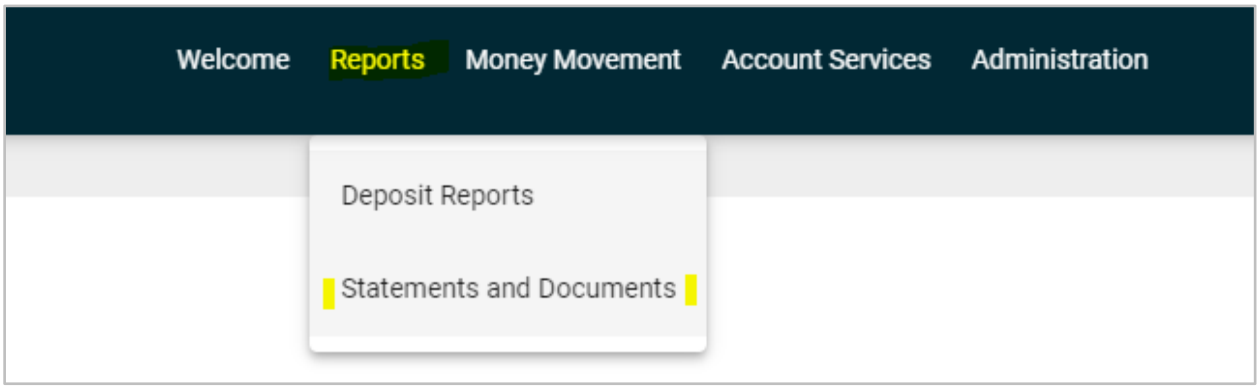
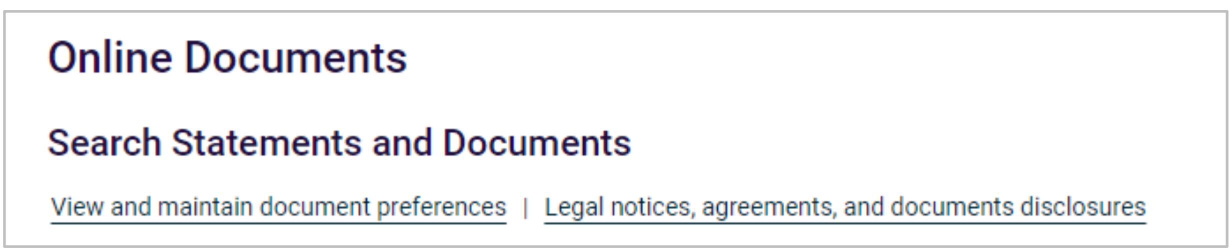
ACCESSING TAX FORMS: BUSINESS BANKING USERS

If you are a business customer and are having trouble finding your tax documents, follow these steps.

1. Sign in on https://www.amerisbank.com using your Business Online Banking credentials.
2. Once you're signed in, click "**Reports**" at the top of the page.



3. From the drop down under Reports, click "**Statements and Documents**"
4. You will then see "**Online Documents**"



5. Under "**Search Statements and Documents,**" click on the link that says "**View and maintain document preferences**"

Online Documents

Manage Delivery Preferences

New selection | Legal notices, agreements, and documents disclosures

6. Under "**Manage Delivery Preferences**" click the link that says "**Legal notices, agreements, and documents disclosures**"

   See Section 5. Tax Documents.

   This list shows all tax documents available for you to access. See this example:

5. Tax Documents
- ☑ 1098 Mortgage Interest Statement
- ☑ 1098-E Student Loan Interest Statement
- ☑ 1099-A Acquisition of Abandonment of Secured Property
- ☑ 1099-B Proceeds from Broker and Barter Exchange Transactions
- ☑ 1099-C Cancellation of Debt
- ☑ 1099-DIV Dividends and Distributions
- ☑ 1099- Int Interest Income
- ☑ 1099- MISC Miscellaneous Income
- ☑ 1099-OID Original Issue Discount
- ☑ 1099-Q Payments from Qualified Education Programs
- ☑ 1099-R Distributions from Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAS, Insurance Contracts, etc.
- ☑ 1099-S Proceeds from Real Estate Transactions
- ☑ 1099-SA Distributions from an HSA , Archer MSA, or Medicare Advantage MSA
- ☑ 5498 IRA Contribution Information
- ☑ 5498-ESA Coverdell ESA Contribution Information
- ☑ 5498-SA HSA. Archer MSA, or Medicate Advantage MSA Information
- ☑ Combined 6807-1098 Loan Year-To-Date Activity / Mortgage Interest Statement

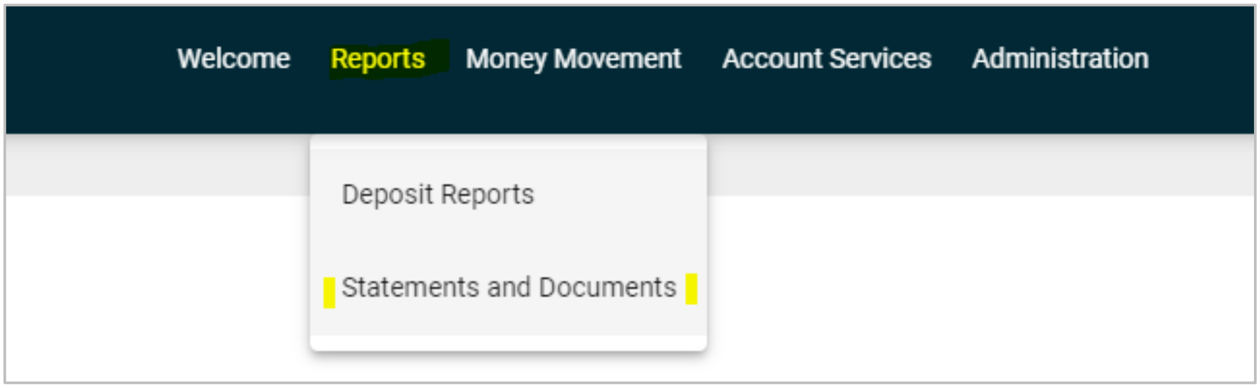
7. For online delivery of tax documents, you must complete the **Acknowledge Online Documents Agreement and Disclosure.**
8. Then, return to **Manage Delivery Preferences.**

   On this screen, scroll to the account last 4 digits and **change delivery preference from Paper to Online.**

Notice	Delivery Preference Paper

9. Then, click of "**Reports**" again.

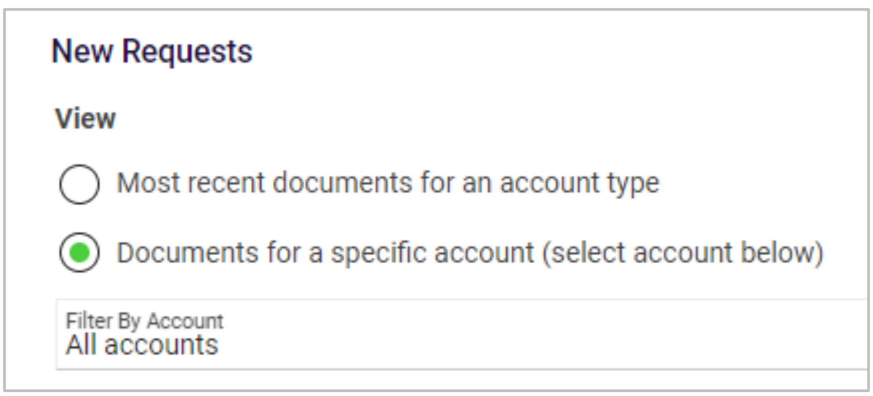
10. Click on "**Statements and Documents**" from the drop down.



You will see "**Online Documents**"

11. Scroll to "**New Requests**"

12. Select "**Documents for a specific accounts**" and choose use under "**Filer By Account**"



13. Click **Continue**

You will then see documents displayed, which can be downloaded or searched.