

ACCESSING TAX FORMS: CONSUMER BANKING USERS

If you are a personal banking customer and do not see your tax documents, please follow these steps.

1. Sign in to <https://www.amerisbank.com> using your Personal Online Banking credentials.
2. Click on “More” on the blue menu bar at the top of the page.



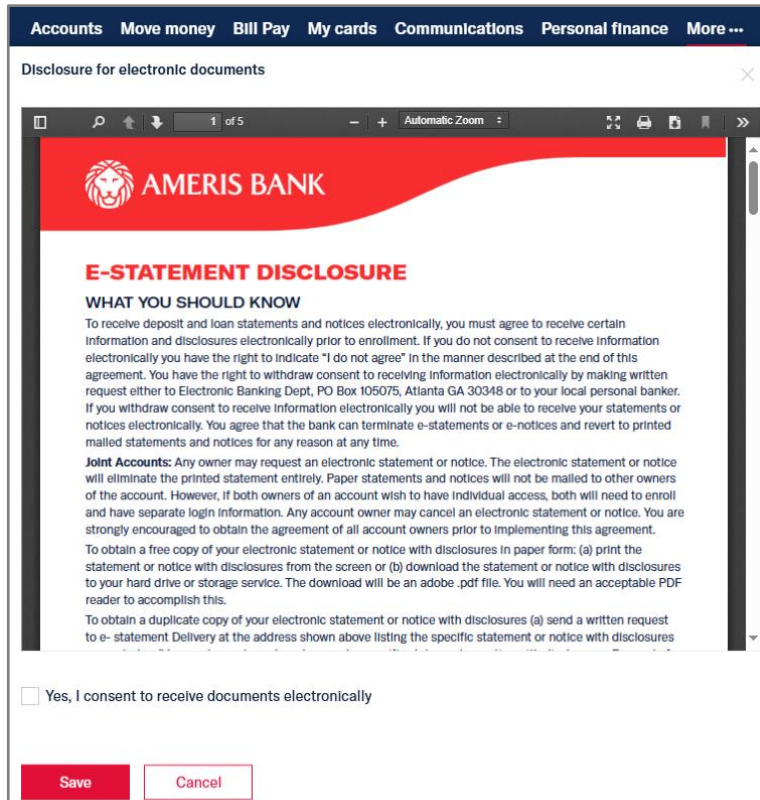
3. Select “Documents” then “Delivery settings.”
4. You have the option to either enable paperless delivery for all statements, notices and tax documents, or make individual selections. Once you have made your selection, click “Apply changes” at the bottom.

A screenshot of the 'Documents' page in the Ameris Bank online banking interface. The 'Delivery settings' tab is selected. The page asks, 'Do you want to enable electronic delivery of statements, notices and tax documents?' with a green toggle switch turned on. Below the toggle is the text 'Enable paperless delivery'. At the bottom, there are two buttons: 'Apply changes' (in red) and 'Cancel' (in white).A screenshot of the 'Documents' page in the Ameris Bank online banking interface, showing individual delivery settings. The 'Delivery settings' tab is selected. The page asks, 'Do you want to enable electronic delivery of statements, notices and tax documents?' with a grey toggle switch turned off. Below this is a table with columns for 'Electronic' and 'Paper' delivery options. The table lists settings for 'Main account', 'Bills Account', and 'Taxes'.

	Electronic	Paper
Main account ****2311		
Monthly account statements and terms of services and disclosure updates	<input type="checkbox"/>	<input type="checkbox"/>
Account notices	<input type="checkbox"/>	<input type="checkbox"/>
Bills Account ****2018		
Monthly account statements and terms of services and disclosure updates	<input type="checkbox"/>	<input type="checkbox"/>
Account notices	<input type="checkbox"/>	<input type="checkbox"/>
Taxes		
Tax documents e.g., 1099INT, 1099DIV, 1098	<input checked="" type="checkbox"/>	<input type="checkbox"/>

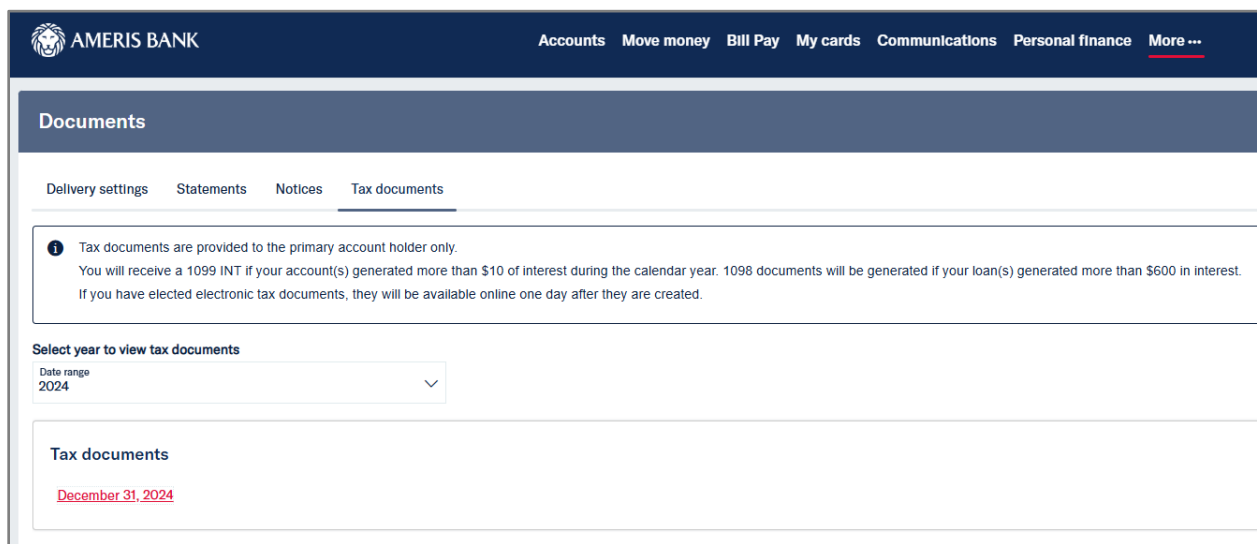
At the bottom, there are two buttons: 'Apply changes' (in red) and 'Cancel' (in white).

5. Select the box acknowledging that you have read and agreed to the e-Statement Disclosure. This allows you to receive your documents online. Then click “Save.”



The screenshot shows a web browser window displaying the "Disclosure for electronic documents" page from Ameris Bank. The page has a red header with the Ameris Bank logo and the text "AMERIS BANK". Below the header, the title "E-STATEMENT DISCLOSURE" is prominently displayed. Underneath, the section "WHAT YOU SHOULD KNOW" contains several paragraphs of text explaining the terms of electronic delivery, including the right to opt out and the bank's ability to terminate electronic delivery. At the bottom of the disclosure text, there is a checkbox labeled "Yes, I consent to receive documents electronically". Below the checkbox are two buttons: "Save" and "Cancel".

6. Go back to the “Documents” section and click on “Tax documents.” Then select the year to view the tax documents from the drop-down menu. Remember, tax forms are available for the primary account holder only.



The screenshot shows the "Documents" section of the Ameris Bank website. The "Documents" header is at the top, followed by tabs for "Delivery settings", "Statements", "Notices", and "Tax documents". The "Tax documents" tab is selected. Below the tabs, there is an information box stating: "Tax documents are provided to the primary account holder only. You will receive a 1099 INT if your account(s) generated more than \$10 of interest during the calendar year. 1098 documents will be generated if your loan(s) generated more than \$600 in interest. If you have elected electronic tax documents, they will be available online one day after they are created." Below this, there is a section titled "Select year to view tax documents" with a "Date range" dropdown menu set to "2024". At the bottom, under the heading "Tax documents", there is a link for "December 31, 2024".

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 Medicare Advantage MSA Information
- Combined 6807-1098 Loan Year-To-Date Activity / Mortgage Interest Statement
- Ameris Bank's Statement of Privacy Principles and any changes thereto
- Any disclosure that would normally be delivered via a deposit or loan statement mailing that may be required by law or regulation.

