

How to view your tax forms on Shareholder Account Manager (SAM)

You are able to view and print any tax form generated in the past 7 years on your account on our website 24 hours a day, 7 days a week.

Log in to Shareholder Account Manager (SAM) and go to 'Account Summary' and select 'Statements' then choose 'Tax Forms'

The screenshot shows the Primerica SAM interface. The 'Account Summary' tab is selected, and the 'Tax Forms' sub-tab is active. A table lists available tax forms:

Year	Form	Description	Action	Instructions
2016	5498R	IRA Contribution Information	VIEW PRINT	5498R
2016	1099R	Distributions from Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs,	VIEW	1099R

All available tax forms (up to 7 years) will be available. As tax forms are generated, the New Year's tax form will post within 2 weeks of the form being generated and the oldest years tax form will no longer be available.

You may 'View' or 'Print' a tax form by clicking on the appropriate link, both options will bring up a new window with a .pdf file* showing your tax form. *Adobe™ Acrobat Reader is required to open these files. Please visit www.adobe.com if not already installed.

To print, hover your mouse over the form and a menu will appear at the bottom of the window, select the printer icon on the file. You may also save a copy of the tax form to your computer by clicking on the save icon.

The screenshot shows a web browser window displaying a tax form (1099-R) from Primerica. The form is titled 'PRIMERICA SHAREHOLDER SERVICES' and includes the following information:

- OMB NO. 1545-0119 Page 1 of 1
- PRIMERICA SHAREHOLDER SERVICES
- PO BOX 9662
- PROVIDENCE RI 02940-9662
- For additional information, please call: 1.800.514.5445
- Form I 1099-R
- RECIPIENT'S IDENTIFICATION NUMBER
- RECIPIENT'S IDENTIFICATION NUMBER
- RECIPIENT'S IDENTIFICATION NUMBER

A PDF viewer overlay is visible at the bottom of the browser window, showing the document's page number (1 / 3) and providing options to 'Save a copy (Shift+Ctrl+S)' and 'Print file (Ctrl+P)'. The recipient's name and address are partially visible: 'Recipient's Name and Address: 04078 PFSAL003 #BWNDBJW PFS INVESTMENTS CUST'.

We also offer the convenience of E-Notification for your tax forms. Those signed up for E-notification of tax forms do not receive a paper copy, instead they receive an e-mail notification when tax forms are available, and tax form will be available immediately without delay. E-Notification allows you to access your tax forms sooner and helps the environment. If you would like to sign up for E-Notification see [How to sign up for Electronic Delivery](#)