To Retrieve Tax Documents

1. Click the link or copy and paste into your browser: https://public-apps.apexclearing.com/session/#/login/
2. Enter your username or email address and click Next (If you have not already created a User ID and password, click Create User ID)
3. Enter your password and click Sign In
4. Enter the Account Number and click Search
5. On the right-hand side is a Documents drop-down box, select Tax Forms
6. Verify that the Tax Year showing is correct
7. Click on the words Tax Document to view the tax form.
8. If you have multiple accounts with the same social security number, you can link them by going to the Apex Online menu, select Add Account and follow the instructions.

APEX | Clearing

Sign In to Apex Online

Username / E-mail Address

For added security, please enter your username or e-mail address first. We will request your password on the following screen.

Next

Create User ID

APEX | Clearing

Sign In to Apex Online

Username / E-mail Address

Password

Sign in

Need help signing in?

APE✕ | Clearing™

Apex Online Menu ⊙

Account Number

🔍 [   ]   Search

Enter at least 3 characters

Welcome to Apex Online

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☆ ✿ Ⓢ

Accounts

Logout ➔

Documents ▾ 🖶

Accounts

Logout ➔

Documents ▾ 🖶

⬇ Account Statements
⬇ Confirms
⬇ Tax Forms

Tax Year [2020 ▾]　[Submit]

Document Name	Account Number	Create Date	Segments
Tax Document	████████	01/26/2021	-