

# Accessing First Republic historical statements and documents and providers of 2024 tax documents

**Historical Statements and Documents:** See the chart below for information on how to access your First Republic historical statements and documents after First Republic Banking Online and Corporate Online are retired on December 12, 2024.

**2024 Tax Documents:** Any 2024 tax documents will be provided by the servicer(s) for your transitioned accounts. You will not receive any tax documents from First Republic. See the chart below for additional information.

FIRST REPUBLIC ACCOUNT TYPE	HISTORICAL STATEMENTS	HISTORICAL DOCUMENTS (INCLUDING TAX DOCUMENTS)	2024 TAX DOCUMENTS (IF TAX DOCUMENT CRITERIA IS MET)
<b>Deposit accounts transitioned to JPMorganChase</b>	<p>Up to 7 years of statements available on JPMorganChase online banking platforms.</p> <p>For additional statements or assistance, reach out to your JPMorganChase team or call us at 888-408-0288.</p>	<p>2023 tax documents available on most JPMorganChase online banking platforms.</p> <p>For additional statements or assistance, reach out to your JPMorganChase team or call us at 888-408-0288.</p>	<p>Will be provided by JPMorganChase in January 2025.</p> <p>Note: Accounts closed in 2024 that did not transition, will also receive 2024 tax documents from JPMorganChase.</p>
<b>Loan and line of credit accounts transitioned to JPMorganChase</b>	<p>For assistance, reach out to your JPMorganChase team or call us at 888-408-0288.</p>		<p>Will be provided by JPMorganChase in January 2025 if you had tax eligible transactions and accounts in 2024.</p> <p>Note: Eligible accounts with tax eligible transactions that were closed in 2024 and did not transition, will also receive 2024 tax documents from JPMorganChase.</p>
<b>Loan and line of credit accounts transitioned to third party servicers</b>	<p>For assistance, reach out to the third party servicer(s) for your transitioned account(s).</p>		<p>Will be provided by the third party servicer(s) of your transitioned account(s) if you had tax eligible transactions and accounts in 2024.</p> <p>Note: You may also receive partial year tax document(s) from JPMorganChase for the period prior to your account transition if you had tax eligible transactions and accounts in 2024.</p>
<b>Investment accounts</b>	<p>Up to 3 years of statements and documents available on Pershing's Online Brokerage site, <a href="http://www.NetXInvestor.com">www.NetXInvestor.com</a>.</p> <p>For instructions on registering and accessing your account information on NetXInvestor, please visit our <a href="#">Help Guide</a>.</p>		<p>Will be provided by Pershing and/or J.P. Morgan depending on if/when accounts were transitioned to J.P. Morgan. Expect tax documents starting in January 2025.</p>
<b>Trust accounts</b>	<p>Up to 3 years of statements available on Trust Online, at <a href="http://www.firstrepublic.com/trustonline">www.firstrepublic.com/trustonline</a>.</p>	<p>Contact your Trust Administration team for assistance.</p>	<p>Will be provided by your Trust Administration team.</p>
<b>Accounts closed prior to 2024</b>	<p>For assistance, call us at 888-408-0288.</p>		<p>Not applicable.</p>