

MS-10 Changes for 2023

Modified on: Mon, 15 Aug, 2022 at 10:24 AM

The DOJ will allow users to upload brokerage and account statements **in lieu of data-entry** for the MS-10 as of July 1, 2022. Fiscal and calendar year filers may opt-in to this feature at any time through July 1, 2023 after which it will become mandatory.

On the Home Page, a new button has been added under the MS-10: "Attach Brokerage Statement".

Report of Common Investments (MS-10)

Filing Status: Not Filed ✖

No. of Records: 1

Last Roll Date: 4/28/2022

Issues: 🔔 **High 0 (0)** 🔔 **Med 0 (0)** 🔔 **Low 0 (0)**

MS-10 Ledger

MS-10 Report ▾

Import File

Attach Brokerage Statement

Reset

Clicking this button bring you to an interface where you can upload statements as file attachments for your MS-10.

Ledger
Brokerage Fees & Expenses
Brokerage Statements

Actions	Filename	Description	Last Modified	EOY Market Value
▾	MS101.pdf	A non-statement document w/ no EOY Value	8/15/2022 8:57:17 AM	
▾	MS101.pdf	Another statement	8/15/2022 8:56:53 AM	\$37,500.00
▾	MS101.pdf	This is a statement from our bank	8/15/2022 8:56:05 AM	\$500.00

Showing 1 to 3 of 3 rows

Add Statement

←

The following file formats are permitted:

File Format	Extension(s)
Microsoft Word Document	DOC, DOCX
Microsoft Excel Spreadsheet	XLS, XLSX
Adobe PDF	PDF
Images	PNG, TIF, TIFF, JPG, JPEG, BMP
Text	TXT, CSV

Although the upload accepts CSV files, this is **not** where you should upload CSV files that you are intending to **import** into the portal to update your MS-10 rec

From this interface you can also edit the description of an existing upload, view/download an upload, or delete an upload via the "Actions" button next to each record in the table.

When adding a new file, click "Browse" and locate the file you wish to upload (1). Provide a brief description of the file (2) and, if applicable, enter the total End of Year market value shown on the statement (3). Finally, click "Save" (4).

Add Brokerage Statement

Select file on your device:

Select file... 1 Browse

Attachment Description 2

Total EOY Market Value from Statement 3

Cancel 4 Save

The total EOY Market Value is not required but is recommended. Providing this value makes it easier for the CTU to complete their review.

 Preview