US Broker Data Export Cheat-Sheet

How to get your transaction history out of every major US platform — the exact clicks, the file you'll get, and the trap to avoid. Keep one export per tax year, forever: your 1099 covers what your broker knows, not what the IRS may ask you to prove.

BROKER	EXPORT PATH	FORMAT	QUIRKS & LIMITS
Robinhood	`Account → Reports and statements → Account activity report → Generate new report → dates → Generate`	CSV	**Generate-and-wait** — reports take ~2h (up to 24h), then appear under Reports. **Crypto, futures & spending activity excluded** — crypto needs its own export. Monthly statements are PDF-only.
Fidelity	`Accounts & Trade → Portfolio → Activity & Orders → date range → Download`	CSV	**~90-day cap per custom range** — a full year = 4 pulls (preset ranges help). ~5 years of history online; older data lives only in statements. Wait for the table to fully load or the download stays disabled.
Charles Schwab	`Accounts → History → Transactions → date range → Search → Export`	CSV	**~1,500 rows per export — exceed it and the file arrives empty, no warning.** Split big histories into quarters. ~4 years online; TD Ameritrade-era gaps → statements are the fallback.
Webull	`App: Account → History → Export Orders (icon) → type + range → confirm email`	CSV	**Email delivery only** (~5–10 min; nothing downloads in-app) and **one file per record type** — orders, dividends and transfers are separate requests. App-only; the website has no export.
E*TRADE	`Accounts → Transactions → date range → download arrow (top right)`	CSV	**Morgan Stanley systems merge (Feb 2026) changed the file layout** — pre-2026 import templates may break. ~7 years of statements online; the transaction tool's lookback is shorter.
Vanguard	`My Accounts → Transaction history → Download → format + range + account`	CSV	**Max 18 months per download.** Export **one account at a time** — multi-account pulls are known to mangle the file. OFX/QFX offered separately for Quicken (the CSV won't import there).
Interactive Brokers	`Performance & Reports → Flex Queries → create query → run`	CSV	Flex Queries run **~one year at a time (365-day max)** — repeat per year. Set date format and time zone in the query before running.
Merrill Edge	`Accounts → Account Resources → Download Account Data → Spreadsheets → tick "Security Transactions"`	CSV	**~3 months per download** — longer periods need repeated pulls. Default filters exclude trades: **"Security Transactions" must be ticked manually.**

The silent caps

US exports truncate without telling you: 90 days (Fidelity) · ~1,500 rows (Schwab) · 3 months (Merrill) · 18 months (Vanguard) · 365 days (IBKR). Export in chunks, check the first and last dates in every file, and never assume "download" meant "everything".

1 · One file per tax year, kept forever
Your consolidated 1099 covers what this broker knows — noncovered cost basis and cross-broker wash sales are yours to track and prove.

2 · Never blend account types
Taxable, traditional IRA and Roth live in different tax universes — keep their files and cost bases apart.

3 · Re-export quarterly
The per-export caps make year-end reconstruction painful — small regular pulls beat one giant December scramble.

4 · The file is records, not tax math
Wash-sale matching runs across ALL your brokers at once — a job for dedicated software, not a quick spreadsheet sum.