



# Investor360<sup>®</sup> Clicks with H&R Block<sup>®</sup> Users.

## **Investor360<sup>®</sup> Makes Filing Easier for H&R Block Users.**

If you're a user of either the web-based or desktop version of H&R Block, you can now import your tax information from Investor360<sup>®</sup>. With just a few short steps, all the key tax data you need is safely, accurately, and easily transferred directly into your electronic return.

With Investor360<sup>®</sup> and H&R Block, you'll do away with:

- The need to gather together a year's worth of statements
- The task of keying in data from multiple sources
- The worry associated with either missing or incorrectly transcribing important tax information

**To see how easily Investor360<sup>®</sup> works with H&R Block, follow the steps on the next page.**

# Here's how it works:

## Step 1

After completing the Personal Information section of the Federal tab, complete the Income section by selecting the types of income you want to include (e.g., 1099-INT interest income, 1099-DIV dividend income, 1099-B stock transactions, 1099-R retirement income).

The screenshot shows the H&R Block 2019 tax software interface. The top navigation bar includes 'Take Me To', 'Forms', 'New/Open', 'Save', 'Print', 'E-File Status', and 'Help Center'. The main header shows 'My taxes for 2019'. The left sidebar has 'Basic' (selected), 'FEDERAL REFUND', 'STATE REFUND', 'Help Center', and 'FAQs'. The main content area is titled 'Where Do You Want To Go?' and lists various income types with 'Go To' links: 'Income Home', 'Your Income', 'Wages (W-2)', 'State and Local Income Tax Refunds (1099-G)', 'Unemployment and Other Government Payments (1099-G)', 'Interest Income (Form 1099-INT)', 'Dividends and Distributions (Form 1099-DIV)', 'Business, Rental, Partnership, Farm, and Royalties', and 'Miscellaneous Business Subsidies'. A 'Previous Screen' button is at the bottom.

## Step 2

Each type of income has its own subsection. Click the **Import** link to import the information from a Form 1099.

The screenshot shows the H&R Block 2019 tax software interface, Step 2: 'Tell us about your dividends and distributions.' The left sidebar is the same as in Step 1. The main content area has a warning: 'This interview isn't final. Visit the Update Center for release dates.' It lists types of income: 'Dividends', 'Money market fund distributions', 'Mutual fund distributions', and 'Real estate investment trust (REIT) distributions'. Below this are two buttons: 'Enter Manually' and 'Import 1099-DIV'. A table with columns 'Payer' and 'Amount' is shown. At the bottom are 'Back' and 'Finished' buttons.

### Step 3

A new screen will open. Type "Investor360" into the "Bank, broker or financial institution name" box. Select **Investor360°** from the list of options and click **Import**.

Import

CLOSE

### Import from Financial Institutions

Bank, broker or financial institution name

- Federated Investors
- Investor360**
- NetXInvestor (Pershing) - Formerly NetExchange Clie
- PIMCO Institutional Investors
- PIMCO Retail Investors - A, B, C

Cancel Import

### Step 4

Enter your Investor360° user ID and password. Then click **Import**.

Import

CLOSE

### Import from Investor360

Investor360°

To import your tax information for brokerage accounts held at National Financial Services (NFS), enter your Investor360 Login ID and password that you normally use to view account information online.  
If you need assistance or have forgotten your password, contact your financial advisor or visit Investor360.

User ID:

Password:

We protect your privacy and security during import.

Cancel Import

## Step 5

Once your Investor360° credentials are validated, your 1099 records will import into the tax return.

**Import**CLOSE

**Success**

We imported your Forms 1099-DIV as well as other Forms 1099 from **Investor360**.

Go through the Interview and edit each item to make sure your information is accurate and complete. Look for information with an exclamation point **!** — that means you need to open the item and verify your information is correct.

**Interest Income (1099-INT)**

NATIONAL FINANCIAL SERVICES LLC	\$743
NATIONAL FINANCIAL SERVICES LLC	\$398
NATIONAL FINANCIAL SERVICES LLC	\$3
NATIONAL FINANCIAL SERVICES LLC	\$1312
NATIONAL FINANCIAL SERVICES LLC	\$688
NATIONAL FINANCIAL SERVICES LLC	\$353
NATIONAL FINANCIAL SERVICES LLC	\$146

**Dividend Income (1099-DIV)**

NATIONAL FINANCIAL SERVICES LLC	\$790
NATIONAL FINANCIAL SERVICES LLC	\$4880
NATIONAL FINANCIAL SERVICES LLC	\$21

**Close**

## Step 6

Please review the entries carefully to confirm they are complete and accurate. Then click **Finished**.

The screenshot shows the H&R BLOCK 2019 tax software interface. The top navigation bar includes icons for 'Take Me To', 'Forms', 'New/Open', 'Save', 'Print', 'E-File Status', and 'Help Center'. The main header displays 'My taxes for 2019' and a series of tabs: WELCOME, FEDERAL (selected), STATE, FILE, and PLAN. Below these are sub-tabs: PERSONAL INFORMATION, INCOME (selected), ADJUSTMENTS, DEDUCTIONS, CREDITS, TAXES, MISC, and FINISH.

On the left sidebar, the 'Basic' section is active, showing a 'FEDERAL REFUND' of \$92,550, a 'LATEST CHANGE' of an increase of \$92,550, and a 'STATE REFUND' of \$0. Below this is a 'Help Center' section with a 'FAQs' link and a list of questions.

The main content area is titled 'Confirm your dividends and distributions.' and includes a warning: 'This interview isn't final. Visit the Update Center for release dates.' Below this, it states 'We imported these for you.' and provides two options: 'Enter Manually' and 'Import 1099-DIV'.

Payer	Amount	Edit	Delete
1st (NATIONAL FINANCIAL SERVICES LLC)	790	Edit	Delete
2nd (NATIONAL FINANCIAL SERVICES LLC)	5,332	Edit	Delete
3rd (NATIONAL FINANCIAL SERVICES LLC)	21	Edit	Delete
4th (NATIONAL FINANCIAL SERVICES LLC)	8,890	Edit	Delete
5th (NATIONAL FINANCIAL SERVICES LLC)	1,475	Edit	Delete

At the bottom of the main content area are two buttons: 'Back' and 'Finished'.

If you're not signed up for Investor360°, call us today to get started.