Investor360°® Clicks with H&R Block® Users.

Investor360° 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^o. 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° 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° 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).

H&R BLOCK		7 Take Me To	Forms	Hew/Open	Save	Print	E-File Status	? Help Center	
My taxes for 2019	WELCOME	FEDERAL		STATE		FILE	Р	LAN	
Basic	PERSONAL INFORMATIO	N INCOME	ADJUST	MENTS DEDUCT	IONS CRED	ITS TAXES	MISC	FINISH	
FEDERAL REFUND	Where Do Y	ou Want	To Go	o?				^	
STATE REFUND	Income Home						0	io To	
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P Help Center	Wages (W-2	Wages (W-2)							
FAQs	State and Local Income Tax Refunds (1099-G)							io To	
	Unemployr	6	io To						
	Interest Inc	6	io To						
	Dividends a	0	io To						
	Business, Rental, Partnership, Farm, and Royalties							ю То	
	Previous Screen							-	
🖾 Send Us Feedbac	k								

Step 2

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

H&R BLOCK		(7) Take Me To	Forms	(+) New/Open	Save	Print	& E-File Status	(?) Help Center		
My taxes for 2019	WELCOME	FEDERAL		STATE		FILE		LAN		
Basic	PERSONAL INFORMATION		ADJUSTME	NTS DEDUCTI	IONS CRED	ITS TAXES	MISC	FINISH		
FEDERAL REFUND	Tell us about	5		s and dis		ons.		^		
state refund \$0	You might have received a Form 1099-DIV or in a letter or statement reporting these: Dividends 									
② Help Center 〒 FAQs	Money market fund distributions Mutual fund distributions Real estate investment trust (REIT) distributions									
What if I received a tax statement with 1099-DIV information on it?	Enter Man Payer	ually 🔮 Im	port 1099-E	DIV		Amoun	t			
Do I need to report dividends that I earn in my 401(k) plan, pension plan, or IRA?										
Do I need to report dividends paid in the form of stock rather than cash?	Back						Finish	ned		
Send Us Feedback										

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**.

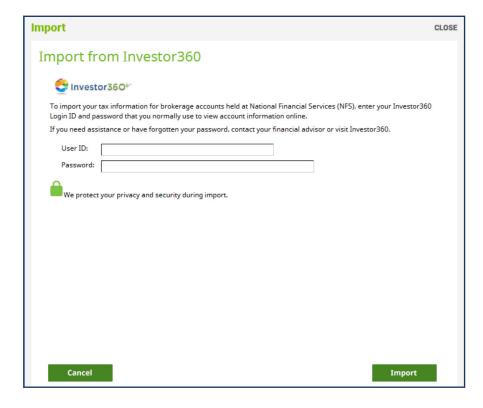
Import

Import from Financial Institutions

CLOSE

Step 4

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





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



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

H&R BLOCK		(7) Take Me To	Forms	+ New/Open	Save		Print	E-File Stat		?) Cente
My taxes for 2019	WELCOME	ELCOME FEDERAL		STATE		FILE		PLAN		
Basic	PERSONAL INFORMATION		ADJUSTM	ENTS DEDU	CTIONS	CREDITS	TAXES	MISC	FINISH	
FEDERAL REFUND FEDERAL REFUND	Confirm you This interview We imported these	isn't final. Visit f				S.				^
▲ Increase of \$92,550 View Details STATE REFUND \$0	Enter Man Payer		port 1099	DIV			Amount			
P Help Center	! 1st (NATION	AL FINANCIAL	SERVICES L	LC)			790		Delete	
∃ FAQs	2nd (NATIONAL FINANCIAL SERVICES LLC)						5,332	Edit	Delete	
What if I received a tax statement with 1099-DIV information on it?	Srd (NATIONAL FINANCIAL SERVICES LLC)						21	Edit	Delete	1
Do I need to report dividends that	4th (NATIONAL FINANCIAL SERVICES LLC)						8,890	Edit	Delete	
I earn in my 401(k) plan, pension plan, or IRA?	5th (NATION	AL FINANCIAL	SERVICES I	LC)			1,475	Edit	Delete	~
Do I need to report dividends paid in the form of stock rather than	Back							Fini	shed	
🛛 Send Us Feedback										

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