



Investor360[®] Clicks with TaxAct Users.

Investor360[®] Makes Filing Easier for TaxAct Users.

If you're a user of either the web-based or desktop version of TaxAct, you can now import your tax information from Investor360[®]. 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 TaxAct, you'll do away with:

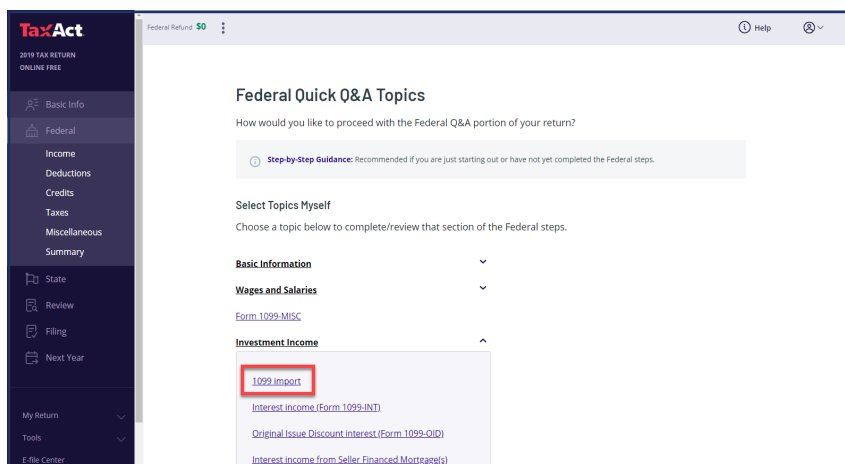
- The need to gather together a year's worth of statements
- The task of keying in data from multiple sources
- The worry associated with either missing or incorrectly transcribing important tax information

To see how easily Investor360[®] works with TaxAct, follow the steps on the next page.

Here's how it works:

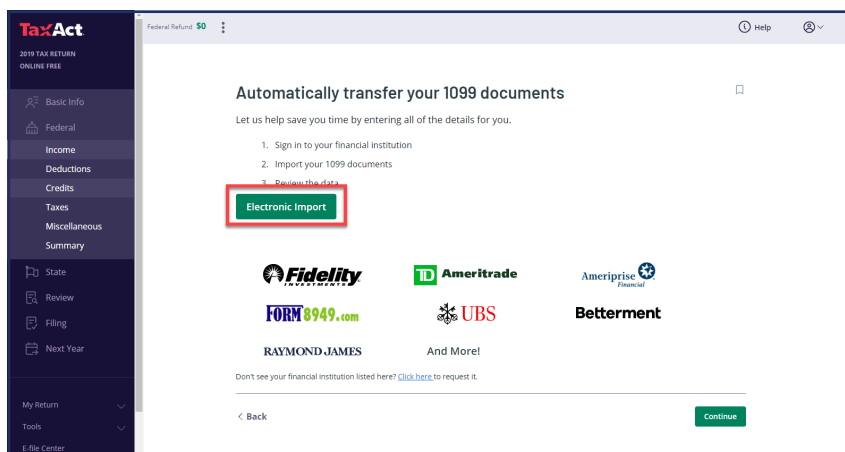
Step 1

As you begin to enter your federal tax information on the Federal tab, in the Investment Income section, click **1099 Import**.



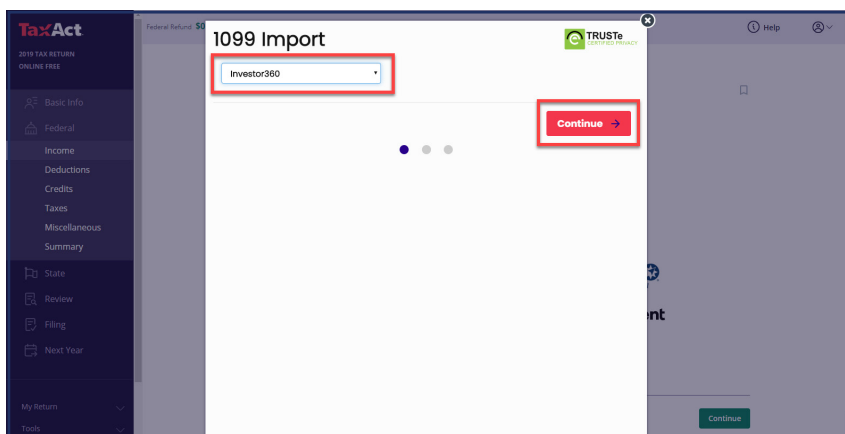
Step 2

On the next screen that appears, click **Electronic Import**.



Step 3

On the 1099 Import screen, select **Investor360°** from the list of available banks and brokerages and click **Continue**.



Step 4

Enter your Investor360° login ID and password and click **Continue**.

The screenshot shows the TaxAct software interface with a sidebar on the left containing navigation options like Basic Info, Federal, Income, Deductions, Credits, Taxes, Miscellaneous, Summary, State, Review, Filing, and Next Year. The main window is titled "1099 Import" and features the Investor360 logo. Below the logo, there is a text block explaining the import process. A red rectangle highlights the "Client login ID to access Investor360" and "Password" input fields. Another red rectangle highlights the "Continue" button at the bottom right of the form area.

1099 Import

Investor360

To import your tax information for brokerage accounts held at National Financial Services (NFS), enter the 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 <https://www.investor360.net>.

Client login ID to access Investor360

Password

Back Continue

Step 5

Select the files you want to import into your tax return by clicking the box to the left of each file, choosing **Select All** or **Select by Type**.

Click **Continue**.

All the tax information you've requested will now be imported directly into your TaxAct return.

It's that simple!

The screenshot shows the TaxAct software interface with the same sidebar as the previous step. The main window is titled "1099 Import" and features the TRUSTe logo. Below the logo, there is a text block explaining the selection process. A table lists two files for selection: "1099-DIV" and "1099-INT", both from "NATIONAL FINANCIAL SERVICES LLC". A red rectangle highlights the "Continue" button at the bottom right of the form area.

1099 Import

TRUSTe

Select which transactions you would like to import into your return.

Form	Description
<input type="checkbox"/> 1099-DIV	NATIONAL FINANCIAL SERVICES LLC
<input type="checkbox"/> 1099-INT	NATIONAL FINANCIAL SERVICES LLC

Select All Select By Type

If any transactions have additional information (reporting category, adjustment code and/or adjustment amount), this information will be included in your return upon successful import of your transactions. The information listed above is the basic information for each transaction included in your account.

Cancel Continue