



# Investor360<sup>®</sup> Clicks with TurboTax<sup>®</sup> Users.

## **Investor360<sup>®</sup> Makes Filing Easier for TurboTax Users.**

If you're a user of either the web-based or desktop version of TurboTax, 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 TurboTax, 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 TurboTax, 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 Taxes tab, in the Import Summary section, click **View**.

The screenshot shows the TurboTax Premier 2019 interface. At the top, there's a blue header with the TurboTax logo and 'Premier' text. Below this is a navigation bar with tabs: PERSONAL INFO, FEDERAL TAXES, STATE TAXES, REVIEW, and FILE. The 'FEDERAL TAXES' tab is selected. Underneath, there are sub-tabs: Wages & Income, Deductions & Credits, Other Tax Situations, Federal Review, and Smart Check. The 'Wages & Income' sub-tab is active. The main content area is titled 'Your 2019 Income Summary'. It includes a section for 'Import Summary' with a 'View' button highlighted. Below that is a section for 'Wages and Salaries' with a 'View' button highlighted. At the bottom, there are 'Back' and 'Next Income Section' buttons.

## Step 2

On the next screen that appears, click **Add Other Documents**.

The screenshot shows the TurboTax Premier 2019 interface, specifically the 'Import Summary' screen. The layout is similar to the previous screen, with the 'FEDERAL TAXES' tab selected and the 'Wages & Income' sub-tab active. The main content area is titled 'Import Summary'. It includes a section for 'Import Summary' with a 'View' button highlighted. Below that is a section for 'Wages and Salaries' with a 'View' button highlighted. At the bottom, there are 'Back' and 'Done' buttons.

### Step 3

Select **Import from my bank or brokerage**.

The screenshot shows the TurboTax Premier 2019 interface. At the top, there's a blue header with the TurboTax logo and 'Premier' text. Below this is a navigation bar with tabs: PERSONAL INFO, FEDERAL TAXES, STATE TAXES, REVIEW, and FILE. The 'FEDERAL TAXES' tab is selected. Underneath, there are sub-tabs: Wages & Income, Deductions & Credits, Other Tax Situations, Federal Review, and Smart Check. The main content area is titled 'Let Us Enter Your Bank and Brokerage Tax Documents'. It features a grid of logos for various financial institutions: Wells Fargo, Morgan Stanley Smith Barney, Fidelity, TD Ameritrade, E\*TRADE, Scottrade, Charles Schwab, Vanguard, and USAA. Below the logos, there's a paragraph explaining that TurboTax can retrieve forms like 1099-INT and 1099-DIV directly from banks and brokerages. It then asks 'How do you want to enter your documents into your return?' with five radio button options: 'Import from my bank or brokerage' (selected), 'Import from Quicken', 'Import from QuickBooks', 'Import from Tax Exchange Format (TXF) file', and 'I'll type it in myself'. There are 'Back', 'Manage Import Options', and 'Continue' buttons at the bottom of the main content area. The status bar at the very bottom shows 'No Form', 'Upgrade TurboTax', 'Tell Us What You Think', 'Help Others', and a progress indicator at 90%.

### Step 4

Type Investor360° into the “Search for Your Financial Institution” box. Select **Investor360°** from the list of available banks and brokerages and click **Continue**.

The screenshot shows the TurboTax Premier 2019 interface at the 'Search for Your Financial Institution' screen. The layout is similar to the previous screen, with the same navigation tabs and sub-tabs. The main content area is titled 'Search for Your Financial Institution'. It features a search box with 'Investor360' entered. Below the search box, there's a list of results, with 'Investor360' selected. Below the list, there's a message: 'Can't find what you're looking for? Select Skip Search.' At the bottom of the main content area, there are 'Back', 'Skip Search', and 'Continue' buttons. The status bar at the very bottom is identical to the previous screen, showing 'No Form', 'Upgrade TurboTax', 'Tell Us What You Think', 'Help Others', and a progress indicator at 90%.

## Step 5

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

The screenshot shows the TurboTax Premier 2019 interface. The top navigation bar includes 'File', 'Edit', 'View', 'Tools', 'Online', and 'Help'. The main header displays 'turbotax. Premier' and a 'Federal Refund' amount of '\$0'. Below the header, there are tabs for 'PERSONAL INFO', 'FEDERAL TAXES', 'STATE TAXES', 'REVIEW', and 'FILE'. Under the 'FILE' tab, there are sub-tabs: 'Wages & Income', 'Deductions & Credits', 'Other Tax Situations', 'Federal Review', and 'Smart Check'. The main content area is titled 'Sign on to Investor360'. It features the Investor360 logo and a sign-in form with fields for 'Login ID:' and 'Password:'. A yellow box on the right states 'We keep your information completely secure.' with a link to 'Learn more about security'. Below the form, there is a paragraph explaining that to import tax information for brokerage accounts held at National Financial Services (NFS), the user must enter their Investor360 Login ID and password. At the bottom of the form, there are 'Back', 'Skip Import', and 'Continue' buttons. The status bar at the very bottom shows 'No Form', 'Upgrade TurboTax', 'Tell Us What You Think', 'Help Others', and a 90% completion indicator.

## Step 6

Select the files you want to import into your tax return by clicking the box to the left of each file.

Click **Import Now**.

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

It's that simple!

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

The screenshot shows the TurboTax Premier 2019 interface at the 'These Documents Are Now Ready for Import' screen. The top navigation bar and header are identical to the previous screenshot. The main content area is titled 'These Documents Are Now Ready for Import:' and includes a note: 'Uncheck any items you don't want included in your return.' Below this, there is a table of documents ready for import. Each row has a checkbox, the document name, the amount, and a 'View Details' link. The documents listed are:

Document Name	Amount	Action
<input checked="" type="checkbox"/> NATIONAL FINANCIAL SERVICE - 1099-DIV	\$21.07	<a href="#">View Details</a>
<input checked="" type="checkbox"/> NATIONAL FINANCIAL SERVICE - 1099-OID	\$5,172.49	<a href="#">View Details</a>
<input checked="" type="checkbox"/> NATIONAL FINANCIAL SERVICE - 1099-INT	\$353.39	<a href="#">View Details</a>
<input checked="" type="checkbox"/> NATIONAL FINANCIAL SERVICE - 1099-DIV	\$942,453.57	<a href="#">View Details</a>
<input checked="" type="checkbox"/> NATIONAL FINANCIAL SERVICE - 1099-INT	\$3.43	<a href="#">View Details</a>
<input checked="" type="checkbox"/> NATIONAL FINANCIAL SERVICE - 1099-INT	\$145.52	<a href="#">View Details</a>
<input checked="" type="checkbox"/> NATIONAL FINANCIAL SERVICE - 1099-DIV	\$690.90	<a href="#">View Details</a>
<input checked="" type="checkbox"/> NATIONAL FINANCIAL SERVICE - 1099-OID	\$950.27	<a href="#">View Details</a>
<input checked="" type="checkbox"/> NATIONAL FINANCIAL SERVICE - 1099-INT	\$398.23	<a href="#">View Details</a>
<input checked="" type="checkbox"/> NATIONAL FINANCIAL SERVICE - 1099-DIV	\$6,890.21	<a href="#">View Details</a>
<input checked="" type="checkbox"/> NATIONAL FINANCIAL SERVICE - 1099-INT	\$1,312.21	<a href="#">View Details</a>
<input checked="" type="checkbox"/> NATIONAL FINANCIAL SERVICE - 1099-DIV	\$9,615.11	<a href="#">View Details</a>

Below the table, there is a note: 'Notify you have other types of documents, they will be available on these dates.' followed by a table of dates:

Document Type	Available Date
1099-B	Available January 29, 2020
1099-DIV	Available January 29, 2020
1099-INT	Available January 29, 2020
1099-MISC	Available January 29, 2020
1099-OID	Available January 29, 2020
1099-R	Available January 29, 2020

At the bottom of the screen, there are 'Skip Import' and 'Import Now' buttons. The status bar at the very bottom shows 'No Form', 'Upgrade TurboTax', 'Tell Us What You Think', 'Help Others', and an 80% completion indicator.