

# 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

On the Wages & Income page of the Federal Taxes tab, choose the radio button marked **A financial institution** and click **Continue**.

TurboTax Deluxe  
Federal Refund \$0

Home Personal Info Federal Taxes State Taxes Wrap-Up Print & File Flags Tools

Wages & Income Deductions & Credits Other Tax Situations Federal Review Error Check

### Let Us Enter Your Tax Info for You

Save Time!  
Import from your bank, broker or software

Where do you want to import from?

- A financial institution [See List](#)
- Quicken(R) [Explain This](#)
- None of the above

Back Skip Import Continue

## Step 2

In the box marked **I'm looking for**, enter the first few letters of Investor360°. Select Investor360° from the list and click **Continue**.

TurboTax Deluxe  
Federal Refund \$0

Home Personal Info Federal Taxes State Taxes Wrap-Up Print & File Flags Tools

Wages & Income Deductions & Credits Other Tax Situations Federal Review Error Check

### Search Your Bank or Broker for Import

Enter the first few letters of your bank or broker's name in the search box and then select their full name from the list below.

Select **Continue** to import, or **Skip this Import** to manually enter your bank or broker info later on.

I'm looking for:  
Investor

Select an item from below.

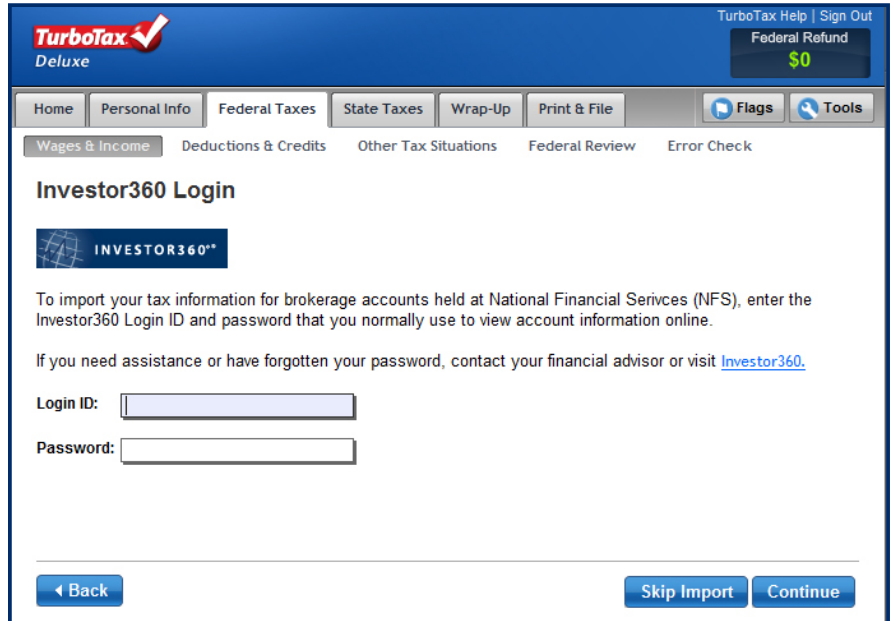
- Invesco Aim
- Investor360
- Ivy Funds
- Ixis Advisor Funds
- J.P. Morgan Clearing Corp.
- Janney Montgomery Scott LLC
- Janus
- John Hancock Funds
- JPMorgan Funds
- Loomis Sayles Funds

Can't find your financial institution? [Let us know.](#)

Back Skip this Import Continue

### Step 3

Enter your Investor360° Login ID and Password and click **Continue**.



The screenshot shows the TurboTax Deluxe interface. At the top right, it says "TurboTax Help | Sign Out" and "Federal Refund \$0". The navigation bar includes "Home", "Personal Info", "Federal Taxes", "State Taxes", "Wrap-Up", and "Print & File". Below this, there are tabs for "Wages & Income", "Deductions & Credits", "Other Tax Situations", "Federal Review", and "Error Check". The main heading is "Investor360 Login". Below the heading is a logo for "INVESTOR360°". The text reads: "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 [Investor360](#)." There are two input fields: "Login ID:" and "Password:". At the bottom, there are three buttons: "Back", "Skip Import", and "Continue".

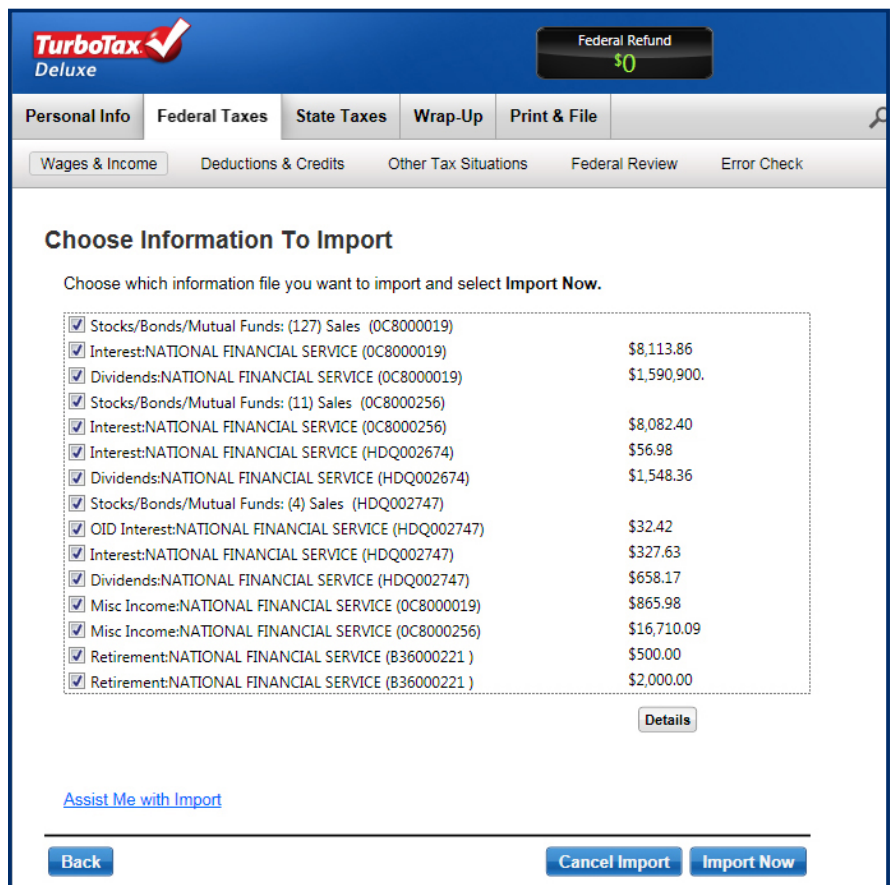
### Step 4

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

Click **Continue**.

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

It's that simple!



The screenshot shows the TurboTax Deluxe interface. At the top right, it says "Federal Refund \$0". The navigation bar includes "Personal Info", "Federal Taxes", "State Taxes", "Wrap-Up", and "Print & File". Below this, there are tabs for "Wages & Income", "Deductions & Credits", "Other Tax Situations", "Federal Review", and "Error Check". The main heading is "Choose Information To Import". Below the heading is the text: "Choose which information file you want to import and select **Import Now**." There is a list of files with checkboxes and amounts:

<input checked="" type="checkbox"/>	Stocks/Bonds/Mutual Funds: (127) Sales (0C8000019)	
<input checked="" type="checkbox"/>	Interest:NATIONAL FINANCIAL SERVICE (0C8000019)	\$8,113.86
<input checked="" type="checkbox"/>	Dividends:NATIONAL FINANCIAL SERVICE (0C8000019)	\$1,590,900.
<input checked="" type="checkbox"/>	Stocks/Bonds/Mutual Funds: (11) Sales (0C8000256)	
<input checked="" type="checkbox"/>	Interest:NATIONAL FINANCIAL SERVICE (0C8000256)	\$8,082.40
<input checked="" type="checkbox"/>	Interest:NATIONAL FINANCIAL SERVICE (HDQ002674)	\$56.98
<input checked="" type="checkbox"/>	Dividends:NATIONAL FINANCIAL SERVICE (HDQ002674)	\$1,548.36
<input checked="" type="checkbox"/>	Stocks/Bonds/Mutual Funds: (4) Sales (HDQ002747)	
<input checked="" type="checkbox"/>	OID Interest:NATIONAL FINANCIAL SERVICE (HDQ002747)	\$32.42
<input checked="" type="checkbox"/>	Interest:NATIONAL FINANCIAL SERVICE (HDQ002747)	\$327.63
<input checked="" type="checkbox"/>	Dividends:NATIONAL FINANCIAL SERVICE (HDQ002747)	\$658.17
<input checked="" type="checkbox"/>	Misc Income:NATIONAL FINANCIAL SERVICE (0C8000019)	\$865.98
<input checked="" type="checkbox"/>	Misc Income:NATIONAL FINANCIAL SERVICE (0C8000256)	\$16,710.09
<input checked="" type="checkbox"/>	Retirement:NATIONAL FINANCIAL SERVICE (B36000221 )	\$500.00
<input checked="" type="checkbox"/>	Retirement:NATIONAL FINANCIAL SERVICE (B36000221 )	\$2,000.00

At the bottom right of the list is a "Details" button. Below the list is a link: "Assist Me with Import". At the bottom, there are three buttons: "Back", "Cancel Import", and "Import Now".

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