



Investor360°[®] Clicks with TurboTax[®] Users.

Investor360° 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°. 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 TurboTax, you'll do away with:

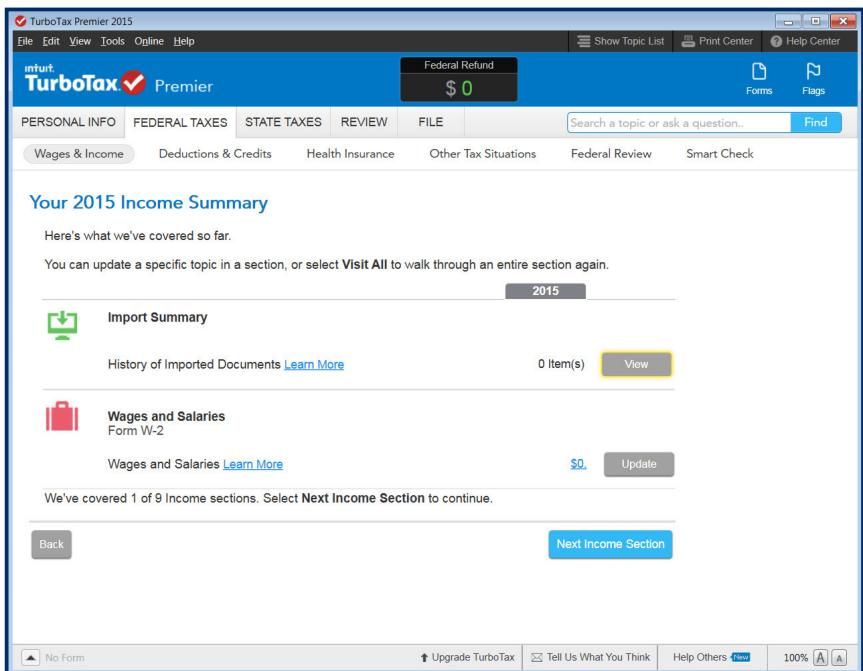
- The need to gather together a year's worth of statements
- The task of keying in data from multiple sources
- The worry associated with either missing or incorrectly transcribing important tax information

To see how easily Investor360° works with TurboTax, follow the steps on the next page.

Here's how it works:

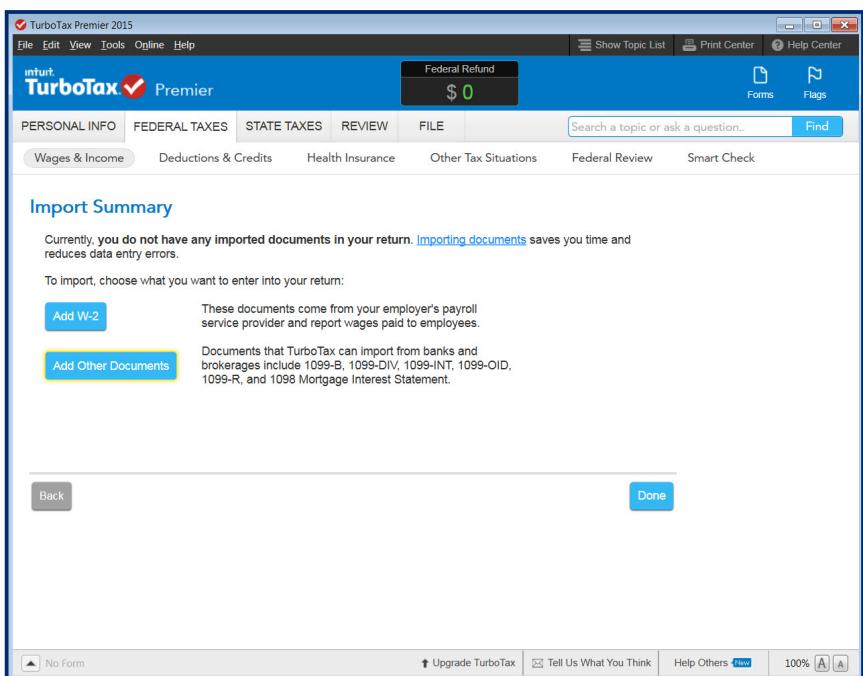
Step 1

As you begin to enter your federal tax information on the Federal Taxes tab, in the Import Summary section, click **View**.



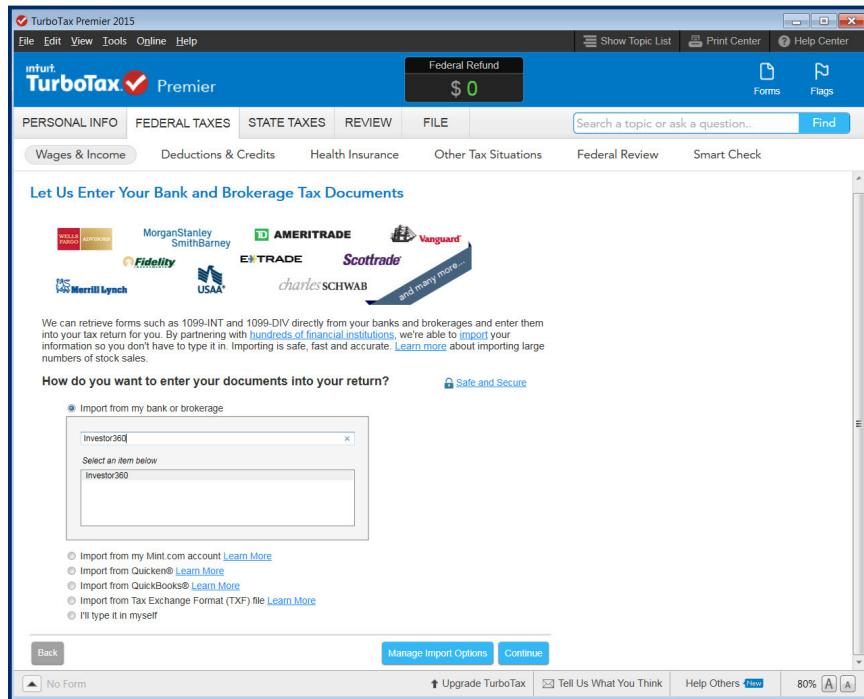
Step 2

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



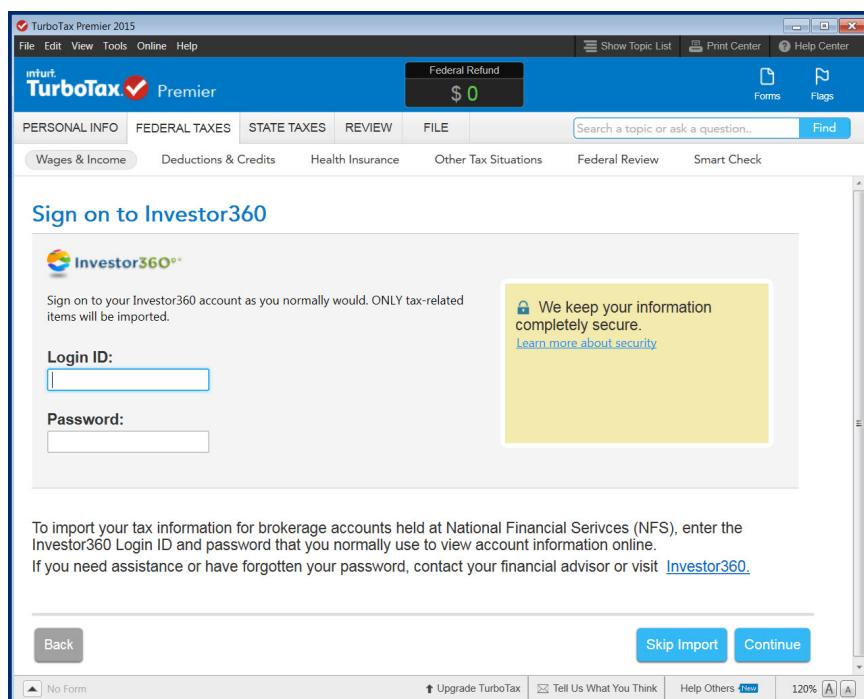
Step 3

Select **Import from my bank or brokerage** and type Investor360° into the “I’m looking for” box. 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**.



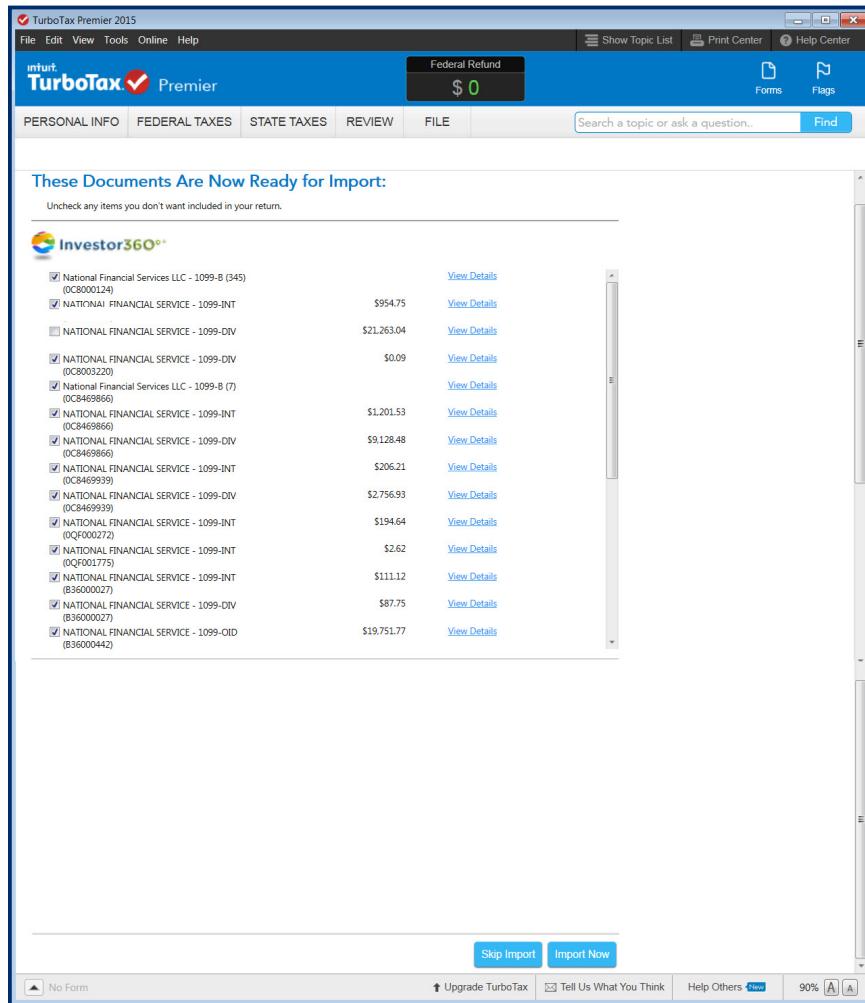
Step 5

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.