



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**.

The screenshot shows the TurboTax Premier 2015 interface. The top navigation bar includes 'PERSONAL INFO', 'FEDERAL TAXES', 'STATE TAXES', 'REVIEW', and 'FILE'. The 'FEDERAL TAXES' tab is active, showing a 'Federal Refund' of '\$0'. Below the navigation bar, there are tabs for 'Wages & Income', 'Deductions & Credits', 'Health Insurance', 'Other Tax Situations', 'Federal Review', and 'Smart Check'. The main content area is titled 'Your 2015 Income Summary' and includes a sub-header 'Import Summary'. It states 'Here's what we've covered so far.' and 'You can update a specific topic in a section, or select Visit All to walk through an entire section again.' Below this, there is a section for 'Wages and Salaries' (Form W-2) with a 'View' button. The bottom of the screen shows a 'Back' button and a 'Next Income Section' button.

Step 2

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

The screenshot shows the TurboTax Premier 2015 interface, specifically the 'Import Summary' section. The top navigation bar is the same as in the previous screenshot. The main content area is titled 'Import Summary' and includes a sub-header 'Currently, you do not have any imported documents in your return. Importing documents saves you time and reduces data entry errors.' Below this, there is a section for 'To import, choose what you want to enter into your return:' with two buttons: 'Add W-2' and 'Add Other Documents'. The 'Add Other Documents' button is highlighted. The bottom of the screen shows a 'Back' button and a 'Done' button.

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**.

TurboTax Premier 2015

File Edit View Tools Online Help

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Federal Refund \$0

PERSONAL INFO FEDERAL TAXES STATE TAXES REVIEW FILE

Wages & Income Deductions & Credits Health Insurance Other Tax Situations Federal Review Smart Check

Let Us Enter Your Bank and Brokerage Tax Documents

We can retrieve forms such as 1099-INT and 1099-DIV directly from your banks and brokerages and enter them into your tax return for you. By partnering with hundreds of financial institutions, we're able to import your information so you don't have to type it in. Importing is safe, fast and accurate. [Learn more](#) about importing large numbers of stock sales.

How do you want to enter your documents into your return?

☒ Import from my bank or brokerage

Investor360

Select an item below

Investor360

☐ Import from my Mint.com account [Learn More](#)

☐ Import from Quicken® [Learn More](#)

☐ Import from QuickBooks® [Learn More](#)

☐ Import from Tax Exchange Format (TXF) file [Learn More](#)

☐ I'll type it in myself

Back Manage Import Options Continue

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Step 4

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

TurboTax Premier 2015

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Federal Refund \$0

PERSONAL INFO FEDERAL TAXES STATE TAXES REVIEW FILE

Wages & Income Deductions & Credits Health Insurance Other Tax Situations Federal Review Smart Check

Sign on to Investor360

Sign on to your Investor360 account as you normally would. ONLY tax-related items will be imported.

Login ID:

Password:

We keep your information completely secure. [Learn more about security](#)

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](#).

Back Skip Import Continue

No Form Upgrade TurboTax Tell Us What You Think Help Others 120%

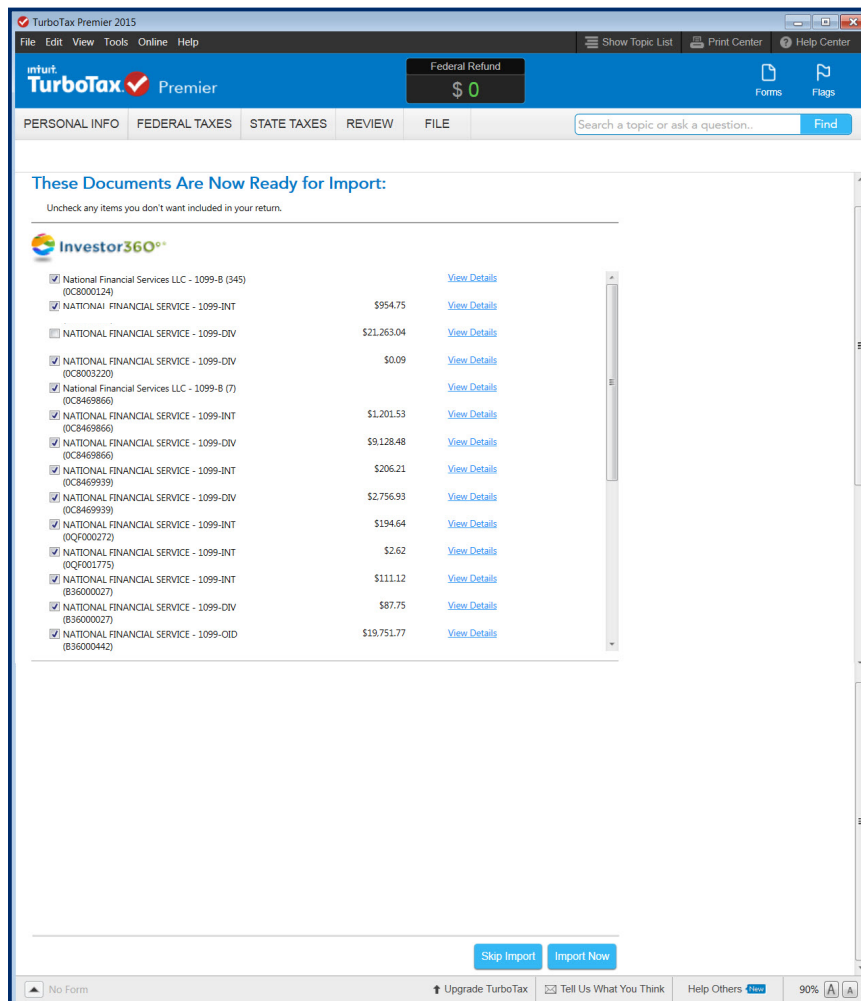
Step 5

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.