



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

## **Investor360<sup>®</sup> 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<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 TaxAct, you'll do away with:

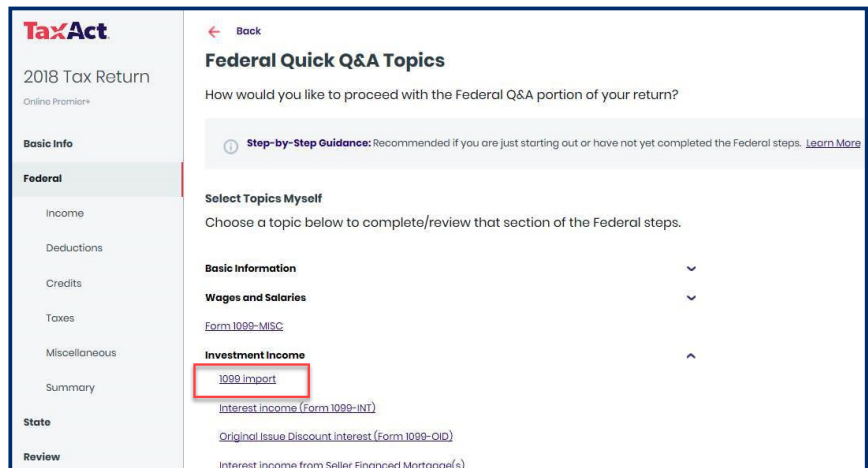
- The need to gather together a year's worth of statements
- The task of keying in data from multiple sources
- The worry associated with either missing or incorrectly transcribing important tax information

**To see how easily Investor360<sup>®</sup> works with TaxAct, follow the steps on the next page.**

# Here's how it works:

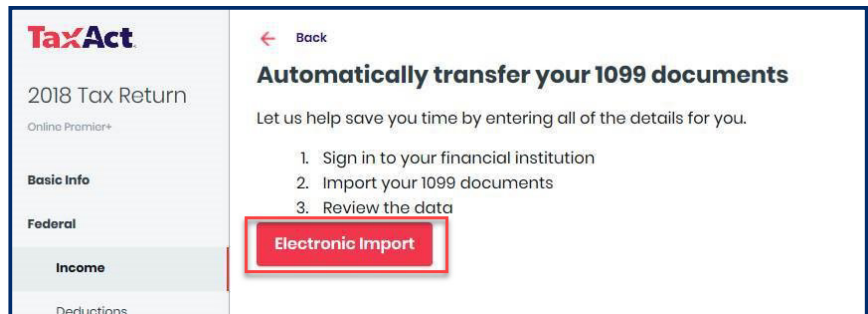
## Step 1

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



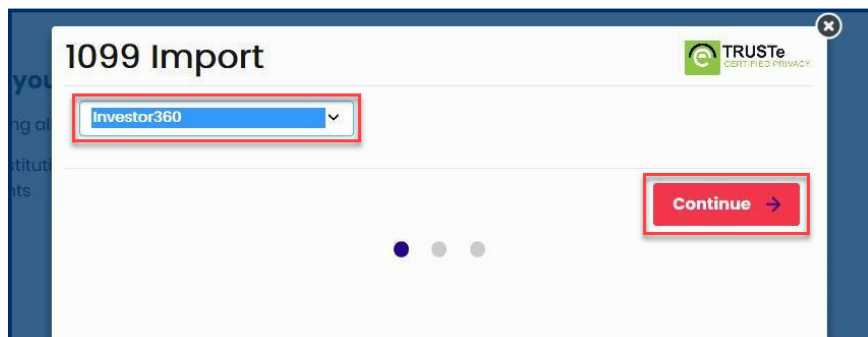
## Step 2

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**.

**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 Investor360.

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!

**1099 Import**

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

	Form	Description
<input type="checkbox"/>	1099-B	0.053 FIDELITY CONSERVATIVE INCOME BND
<input type="checkbox"/>	1099-B	5.24 FIDELITY LARGE CAP GROWTH INDEX
<input type="checkbox"/>	1099-B	5.071 FIDELITY LARGE CAP VALUE INDEX F
<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