



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:

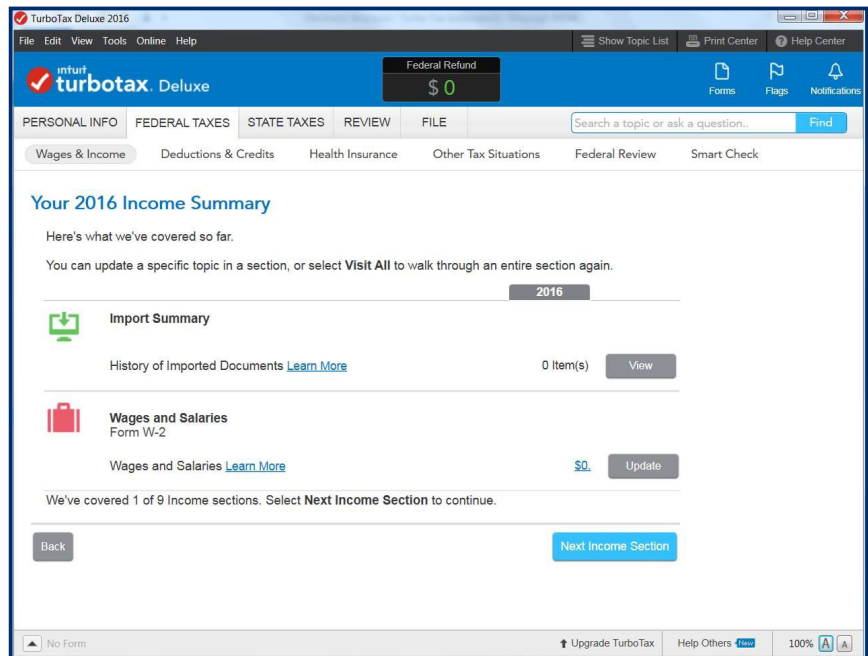
- The need to gather together a year's worth of statements
- The task of keying in data from multiple sources
- The worry associated with either missing or incorrectly transcribing important tax information

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

Here's how it works:

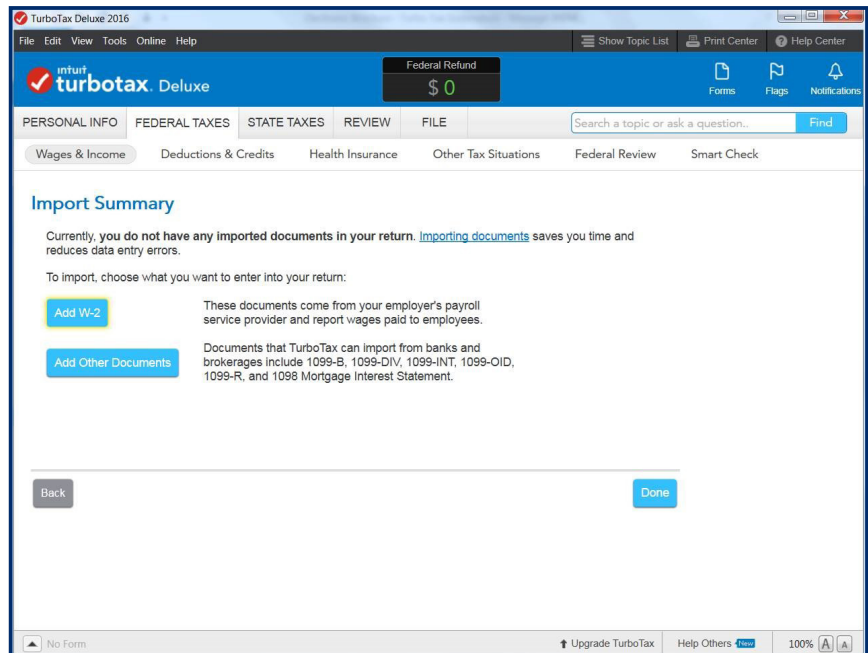
Step 1

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**.

The screenshot shows the TurboTax Deluxe 2016 interface. The top navigation bar includes 'PERSONAL INFO', 'FEDERAL TAXES', 'STATE TAXES', 'REVIEW', and 'FILE'. The 'FEDERAL TAXES' section 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 'Let Us Enter Your Bank and Brokerage Tax Documents'. It features logos for various financial institutions: Wells Fargo, Morgan Stanley Smith Barney, Ameritrade, Vanguard, Fidelity, E*TRADE, Scottrade, and Charles Schwab. A text box explains that TurboTax can retrieve forms like 1099-INT and 1099-DIV directly from banks and brokerages. Below this, a question asks 'How do you want to enter your documents into your return?'. The 'Import from my bank or brokerage' option is selected. A search box labeled 'I'm looking for' contains the text 'Investor360'. A dropdown menu below the search box shows 'Investor360' as the selected option. Other options include 'Import from Quicken', 'Import from QuickBooks', 'Import from Tax Exchange Format (TXF) file', and 'I'll type it in myself'. A 'Continue' button is visible at the bottom right of the selection area.

Step 4

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

The screenshot shows the TurboTax Deluxe 2016 interface at the 'Sign on to Investor360' screen. The top navigation bar is the same as in Step 3. The main content area is titled 'Sign on to Investor360'. It features the Investor360 logo and a message: 'Sign on to your Investor360 account as you normally would. ONLY tax-related items will be imported.' Below this, there are two input fields: 'Login ID:' and 'Password:'. To the right of the input fields, there is a yellow box with a lock icon and the text: 'We keep your information completely secure. Learn more about security.' At the bottom of the screen, there are three buttons: 'Back', 'Skip Import', and 'Continue'. The status bar at the bottom shows 'No Form', 'Upgrade TurboTax', 'Help Others', and '100%' zoom.

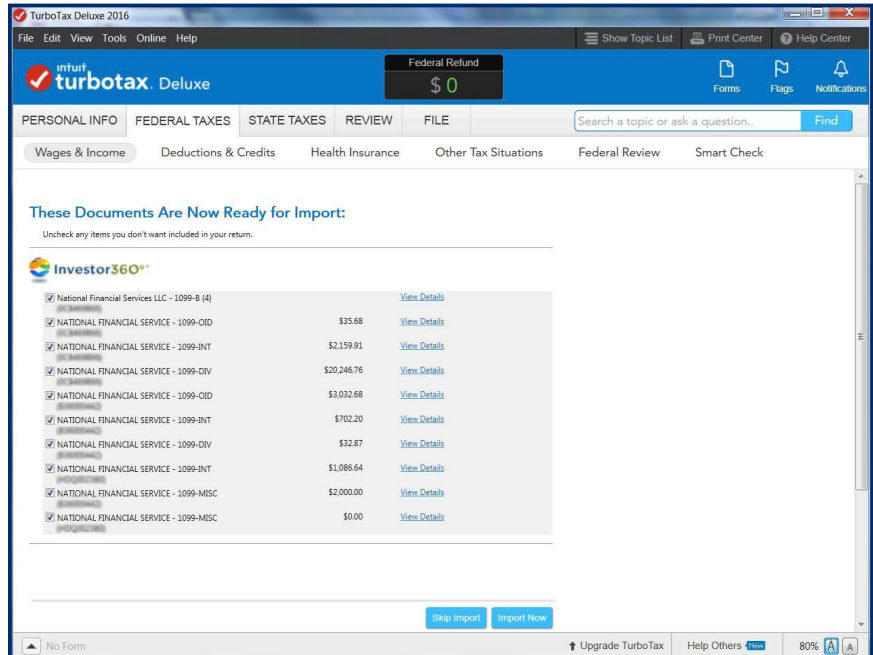
Step 5

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.