



# Investor360<sup>®</sup> Clicks with H&R Block<sup>®</sup> Users.

## **Investor360<sup>®</sup> Makes Filing Easier for H&R Block Users.**

If you're a user of either the web-based or desktop version of H&R Block, 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 H&R Block, you'll do away with:

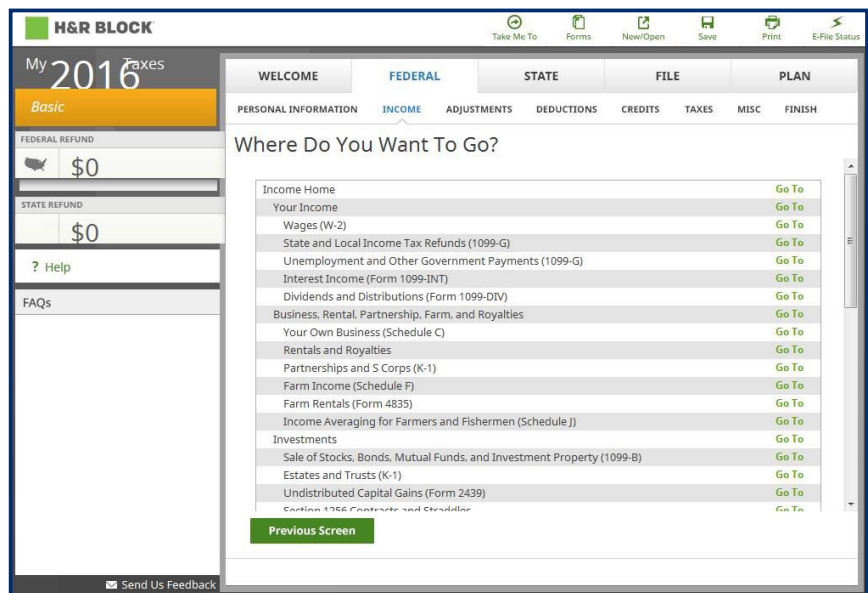
- The need to gather together a year's worth of statements
- The task of keying in data from multiple sources
- The worry associated with either missing or incorrectly transcribing important tax information

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

# Here's how it works:

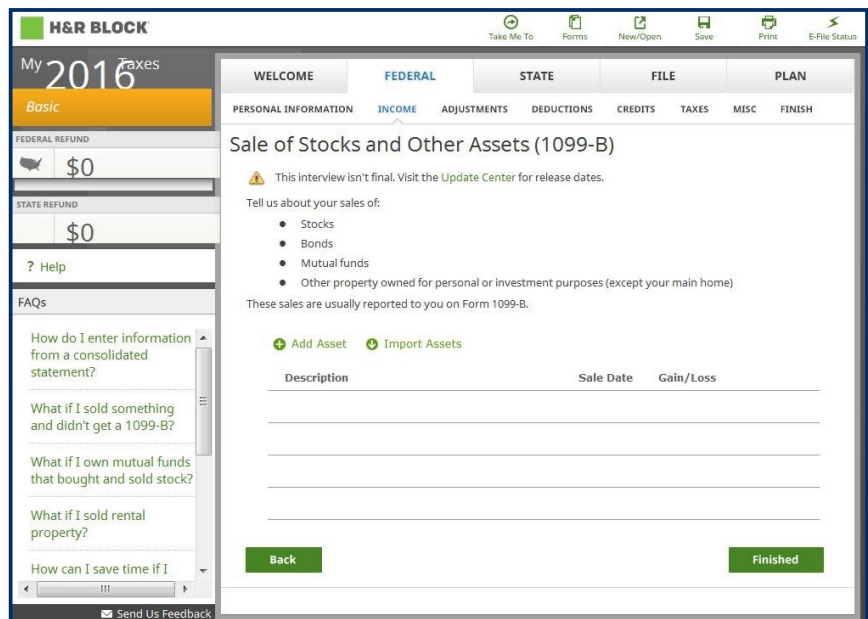
## Step 1

After completing the Personal Information section of the Federal tab, complete the Income section by selecting the types of income you want to include (e.g., 1099-INT interest income, 1099-DIV dividend income, 1099-B stock transactions, 1099-R retirement income).



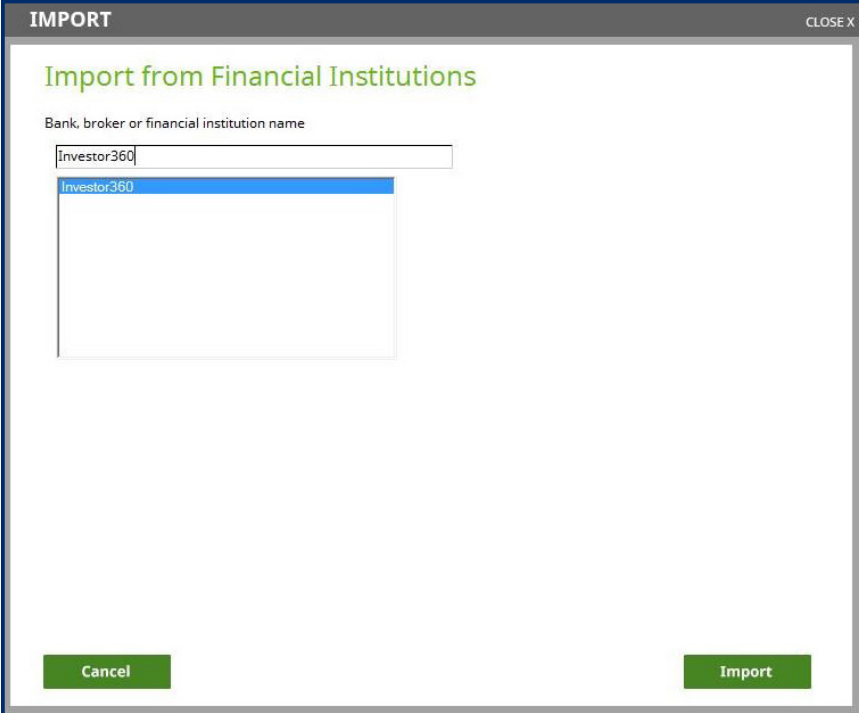
## Step 2

Each type of income has its own subsection. Click the **Import** link to import the information from a Form 1099.



### Step 3

A new screen will open. Type "Investor360" into the "Bank, broker or financial institution name" box. Select **Investor360°** from the list of options and click **Import**.




The screenshot shows a dialog box titled "IMPORT" with a "CLOSE X" button in the top right corner. The main heading is "Import from Financial Institutions". Below this, there is a label "Bank, broker or financial institution name" followed by a text input field containing "Investor360". A dropdown menu is open below the input field, showing a single option "Investor360°" which is highlighted with a blue background. At the bottom of the dialog, there are two buttons: "Cancel" on the left and "Import" on the right, both in green.

## Step 4

Enter your Investor360° user ID and password.  
Then click **Import**.

**IMPORT** CLOSE X

### Import from Investor360


 Investor360°

To import your tax information for brokerage accounts held at National Financial Services (NFS), enter your 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.

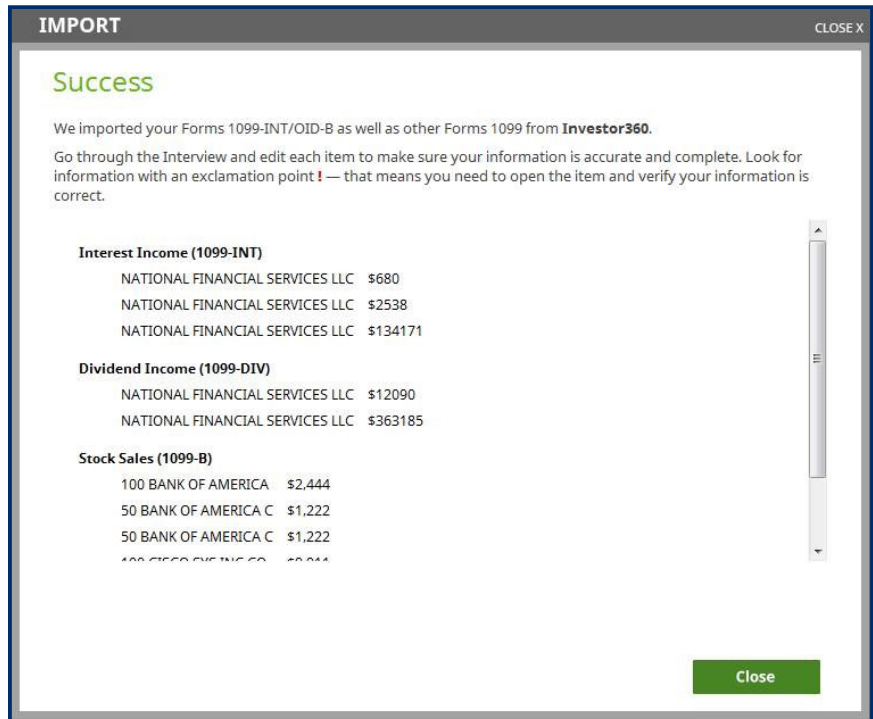
User ID:

Password:

 We protect your privacy and security during import.

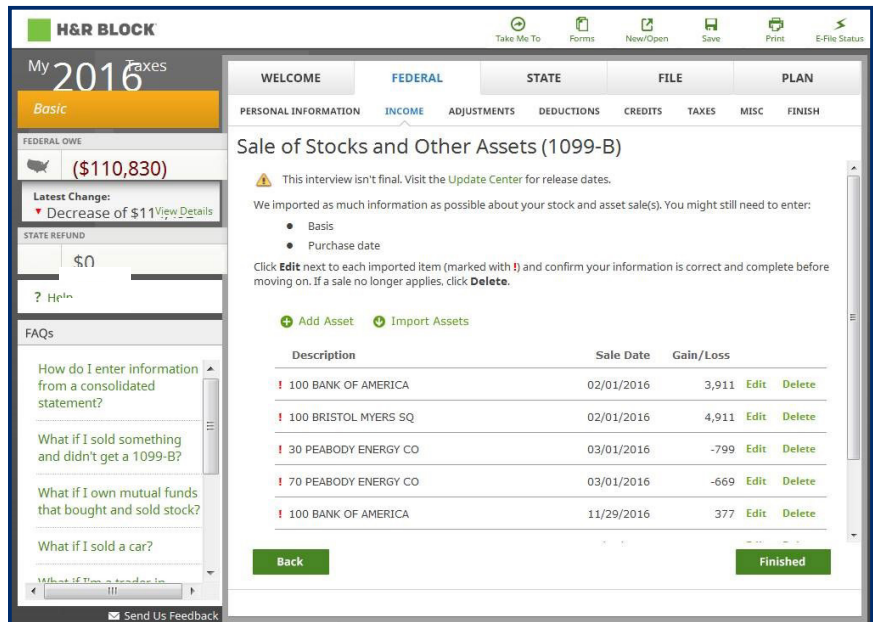
## Step 5

Once your Investor360° credentials are validated, your 1099 records will import into the tax return.



## Step 6

Please review the entries carefully to confirm they are complete and accurate. Then click **Finished**.



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

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