



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:

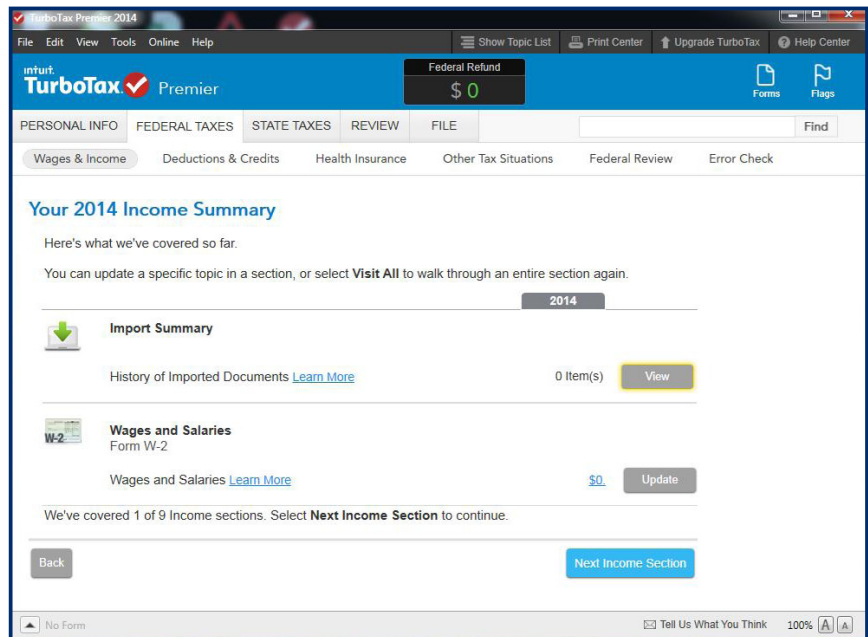
- The need to gather together a year's worth of statements
- The task of keying in data from multiple sources
- The worry associated with either missing or incorrectly transcribing important tax information

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

Here's how it works:

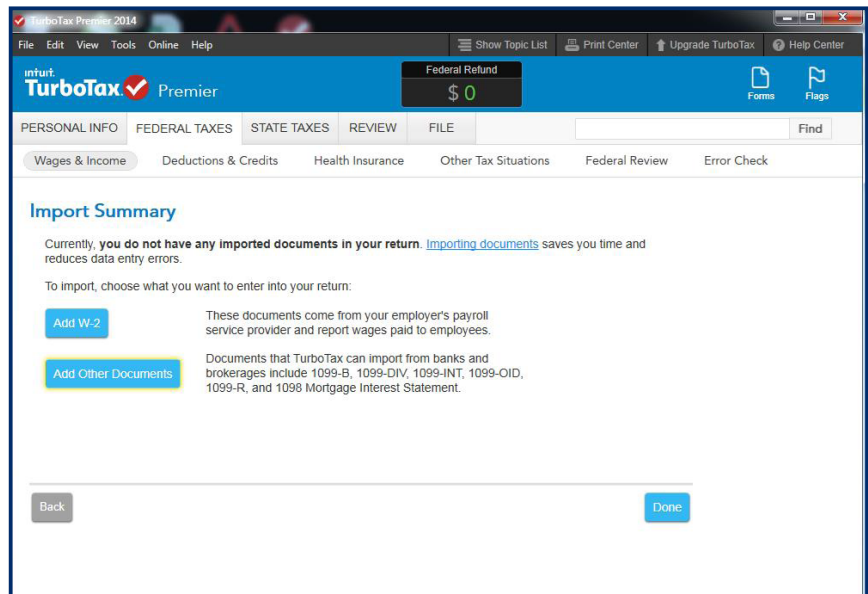
Step 1

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



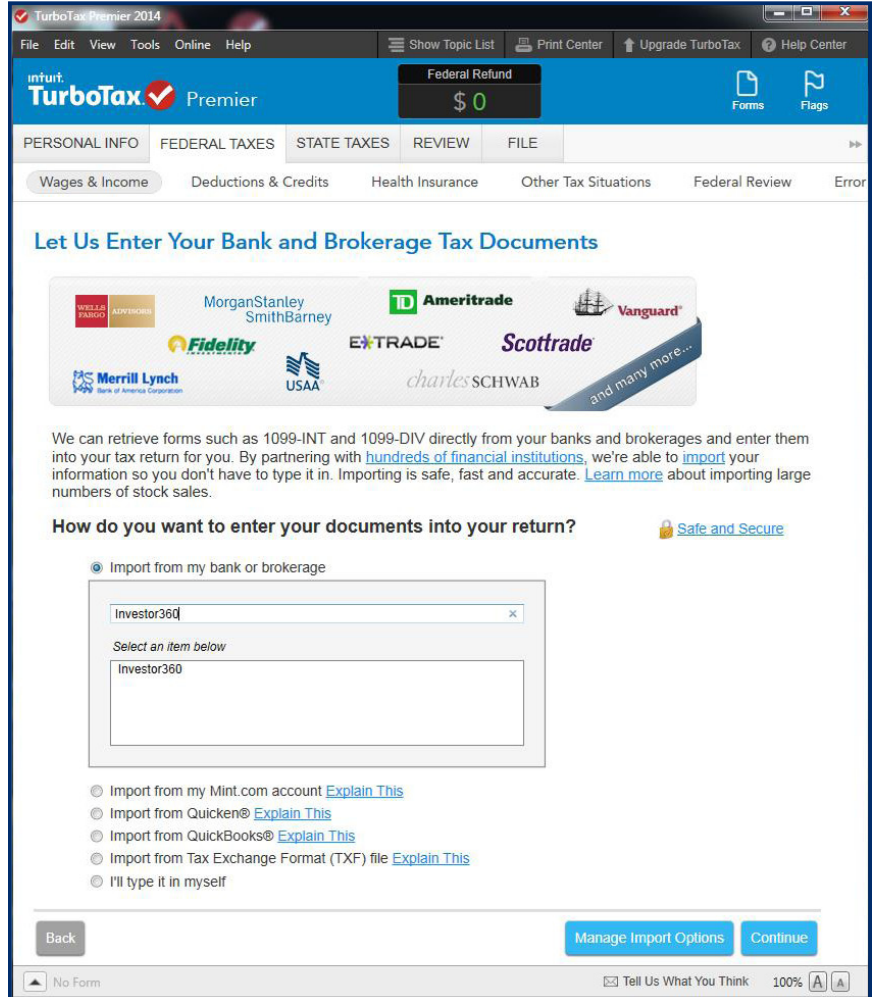
Step 2

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



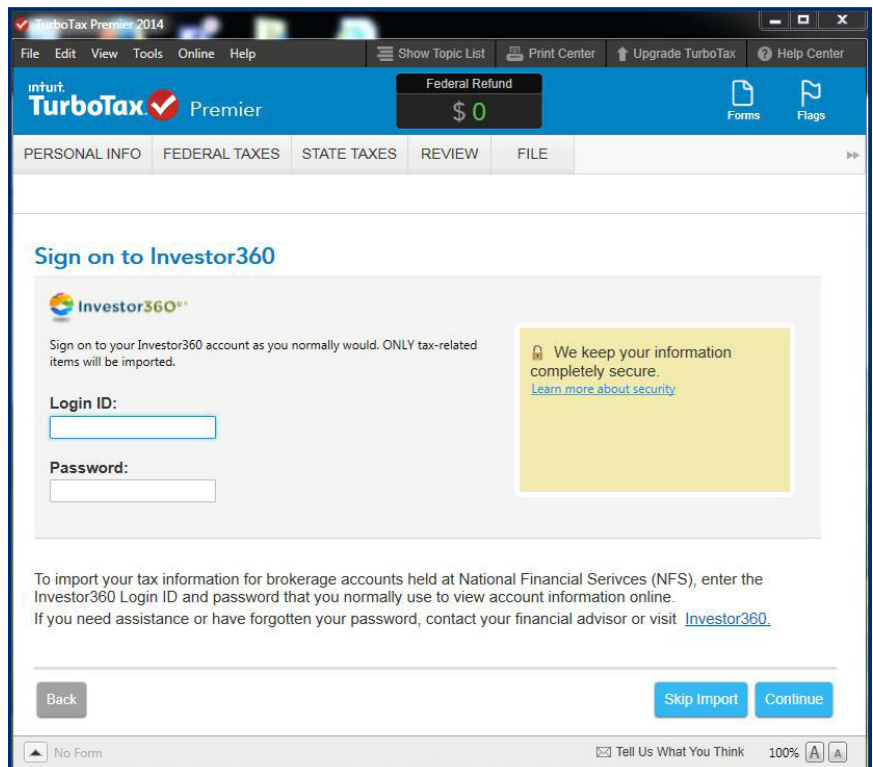
Step 3

Select **Import from my bank 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**.



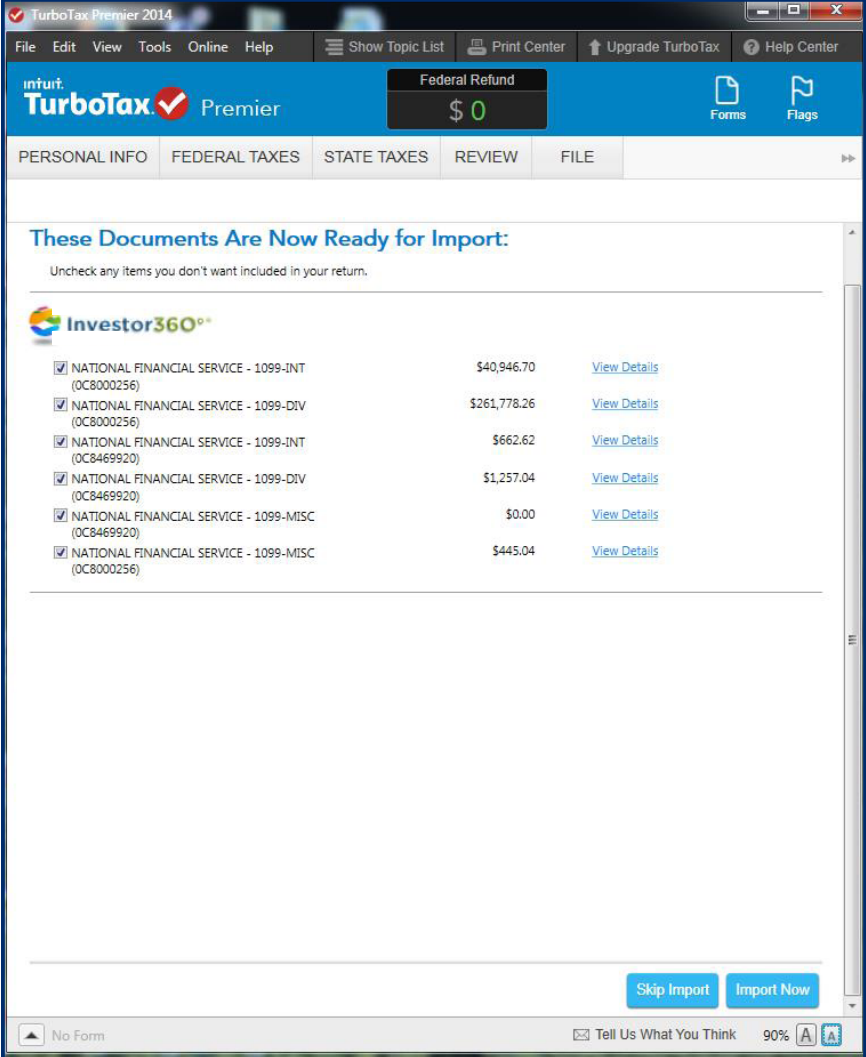
Step 5

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!



The screenshot shows the TurboTax Premier 2014 interface. At the top, there's a blue header with the TurboTax logo and a 'Federal Refund' box showing '\$0'. Below the header is a navigation bar with tabs for 'PERSONAL INFO', 'FEDERAL TAXES', 'STATE TAXES', 'REVIEW', and 'FILE'. The main content area is titled 'These Documents Are Now Ready for Import:' and includes a sub-header 'Uncheck any items you don't want included in your return.' Below this is a list of documents from Investor360, each with a checked checkbox, a description, a dollar amount, and a 'View Details' link. At the bottom right of the list area are two buttons: 'Skip Import' and 'Import Now'.

Document Description	Amount	Action
<input checked="" type="checkbox"/> NATIONAL FINANCIAL SERVICE - 1099-INT (OC8000256)	\$40,946.70	View Details
<input checked="" type="checkbox"/> NATIONAL FINANCIAL SERVICE - 1099-DIV (OC8000256)	\$261,778.26	View Details
<input checked="" type="checkbox"/> NATIONAL FINANCIAL SERVICE - 1099-INT (OC8469920)	\$662.62	View Details
<input checked="" type="checkbox"/> NATIONAL FINANCIAL SERVICE - 1099-DIV (OC8469920)	\$1,257.04	View Details
<input checked="" type="checkbox"/> NATIONAL FINANCIAL SERVICE - 1099-MISC (OC8469920)	\$0.00	View Details
<input checked="" type="checkbox"/> NATIONAL FINANCIAL SERVICE - 1099-MISC (OC8000256)	\$445.04	View Details

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