



# 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).

The screenshot shows the H&R Block software interface for the 2017 tax year. The user is on the 'FEDERAL' tab, specifically in the 'INCOME' section. The main area is titled 'Where Do You Want To Go?' and contains a list of income types with 'Go To' links for each. The list includes: Income Home, Your Income, Wages (W-2), State and Local Income Tax Refunds (1099-G), Unemployment and Other Government Payments (1099-G), Interest Income (Form 1099-INT), Dividends and Distributions (Form 1099-DIV), Business, Rental, Partnership, Farm, and Royalties, Your Own Business (Schedule C), Rentals and Royalties, Partnerships and S Corps (K-1), Farm Income (Schedule F), Farm Rentals (Form 4835), Income Averaging for Farmers and Fishermen (Schedule J), Investments, Sale of Stocks, Bonds, Mutual Funds, and Other Securities (1099-B), Estates and Trusts (K-1), Undistributed Capital Gains (Form 2439), Section 1256 Contracts and Straddles, Capital Loss Carryover, Retirement and Rollovers, IRA and Pension Income (Form 1099-R), IRA Distributions - Additional Information, Social Security Income, Sales and Other Transfers, Sale of Home, Sale of Collectibles and Other Investment Property, Like-Kind Exchanges (1031 Exchanges), Installment Sales, and Business Assets Sold. A 'Previous Screen' button is at the bottom.

## Step 2

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

The screenshot shows the H&R Block software interface for the 2017 tax year, specifically the 'Dividends and Distributions' subsection. The user is on the 'FEDERAL' tab, specifically in the 'INCOME' section. The main area is titled 'Dividends and Distributions' and contains a warning message: 'This interview isn't final. Visit the Update Center for release dates.' Below this, it says 'Tell us about your dividends and distributions. You might have received a Form 1099-DIV or in a letter or statement reporting these:' followed by a list of income types: Dividends, Money market fund distributions, Mutual fund distributions, and Real estate investment trust (REIT) distributions. There are two buttons: 'Add 1099-DIV' and 'Import 1099-DIV'. Below these buttons is a table with two columns: 'Payer' and 'Amount'. The table has three empty rows for data entry. At the bottom, there are 'Back' and 'Finished' buttons.

### 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 green buttons: "Cancel" on the left and "Import" on the right.

Step 4

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

**IMPORT** CLOSE X


### Import from 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.

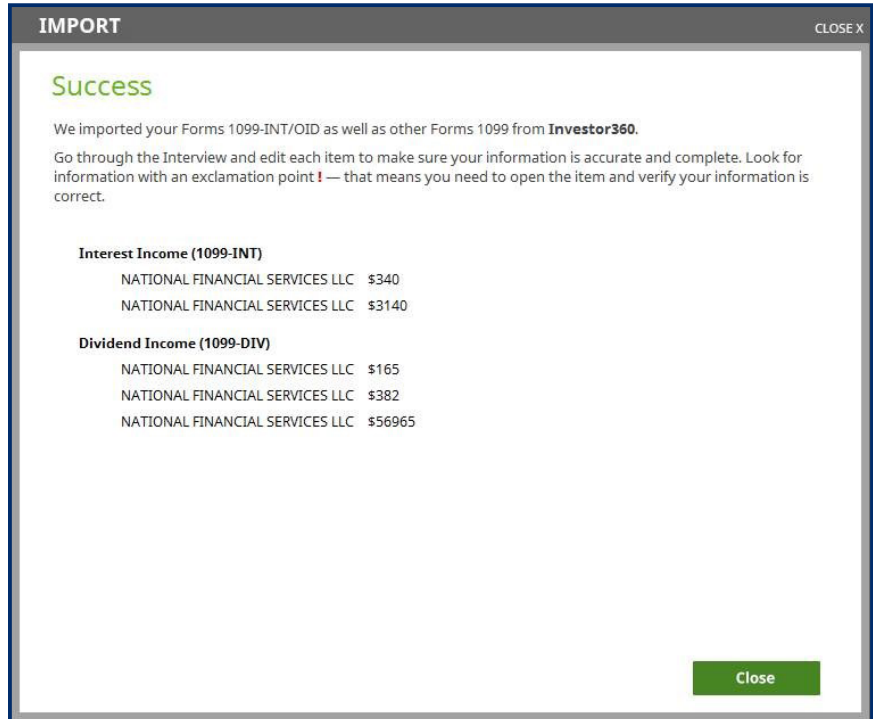
User ID:

Password:

 We protect your privacy and security during import.

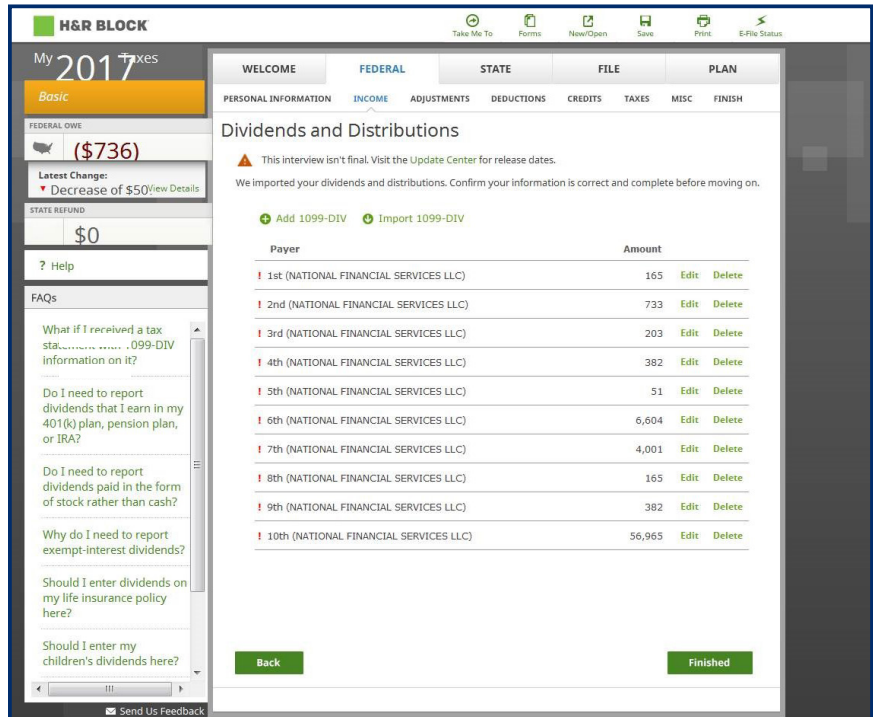
## Step 5

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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