Investor360°® Clicks with H&R Block® Users.

Investor360° 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°. 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 H&R Block, you'll do away with:

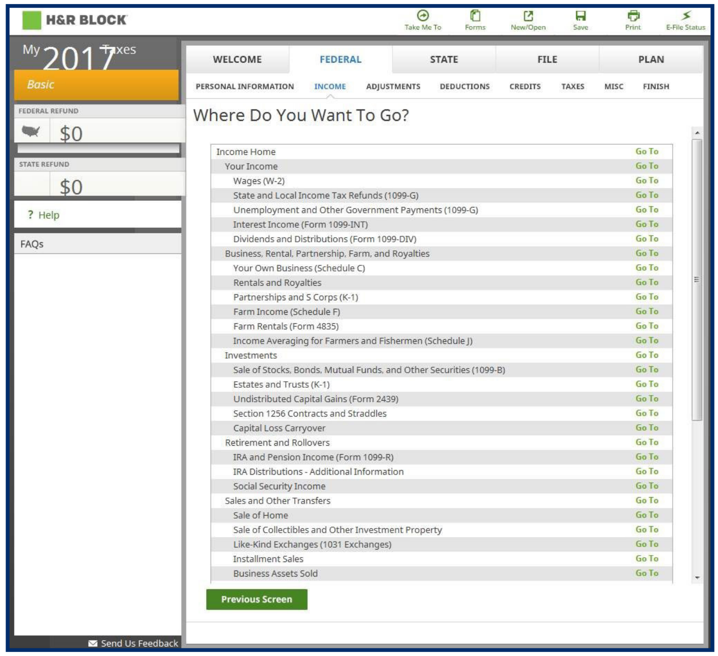
- The need to gather together a year's worth of statements
- The task of keying in data from multiple sources
- The worry associated with either missing or incorrectly transcribing important tax information

To see how easily Investor360° works with H&R Block, follow the steps on the next page.

Here's how it works:

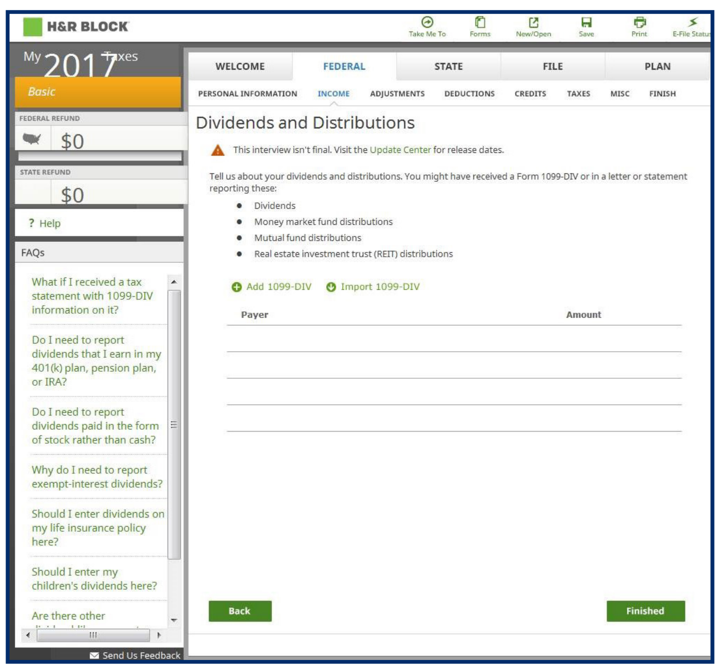
Step 1

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).



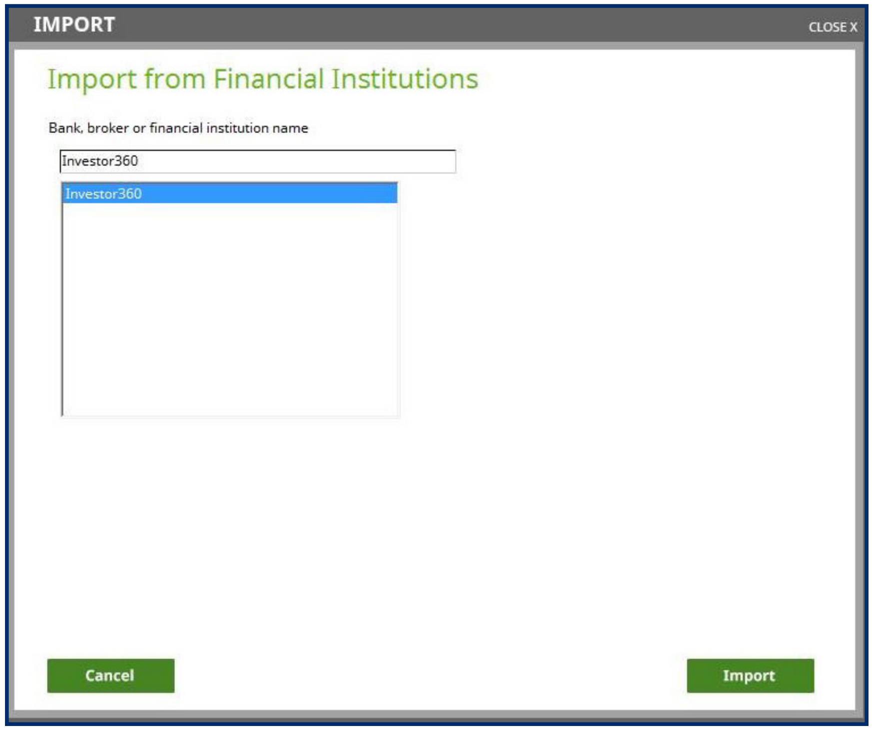
Step 2

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



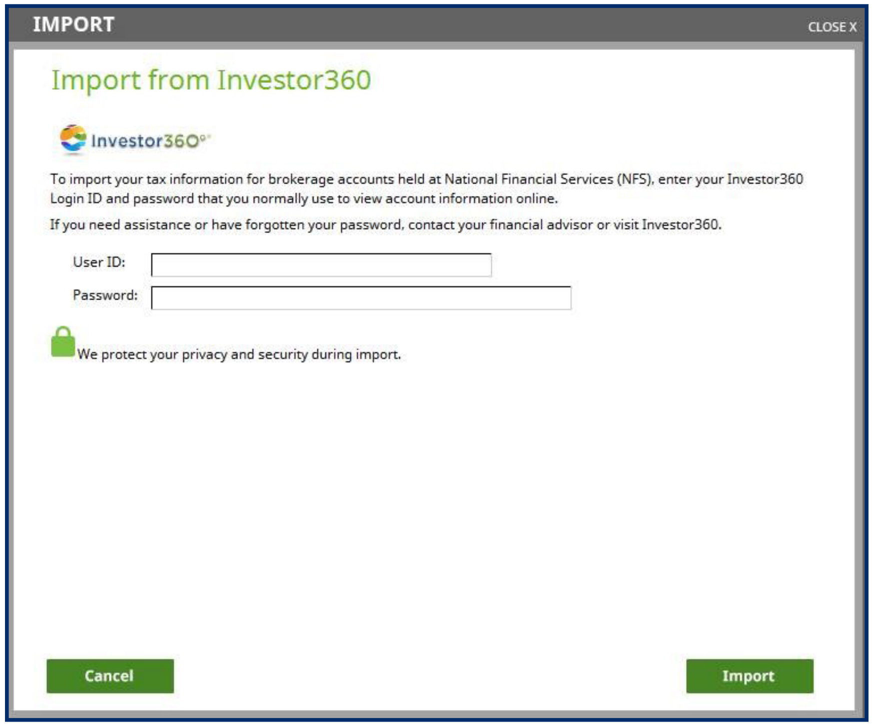
Step 3

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**.



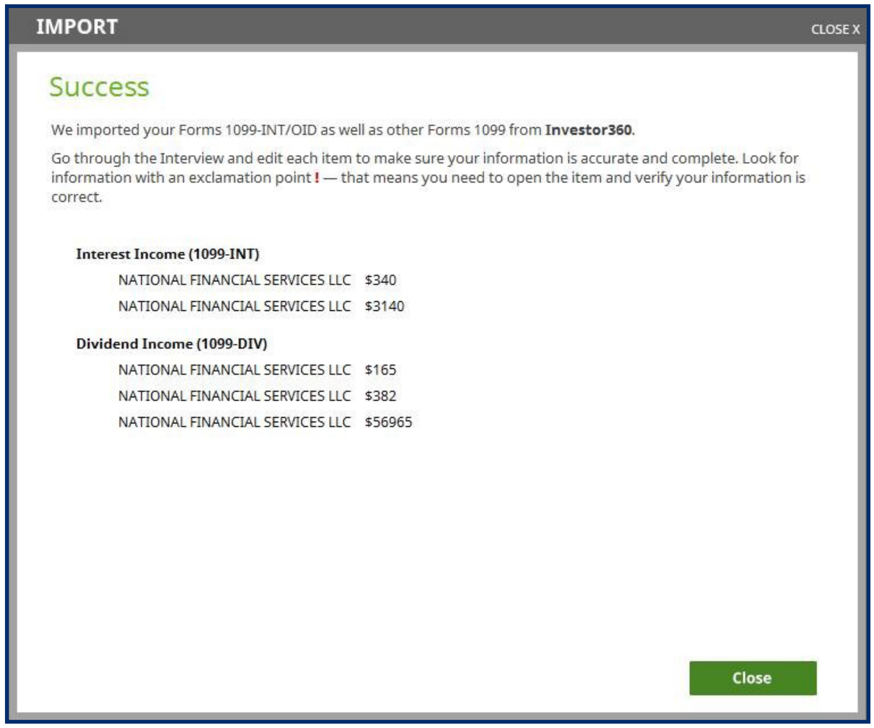
Step 4

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



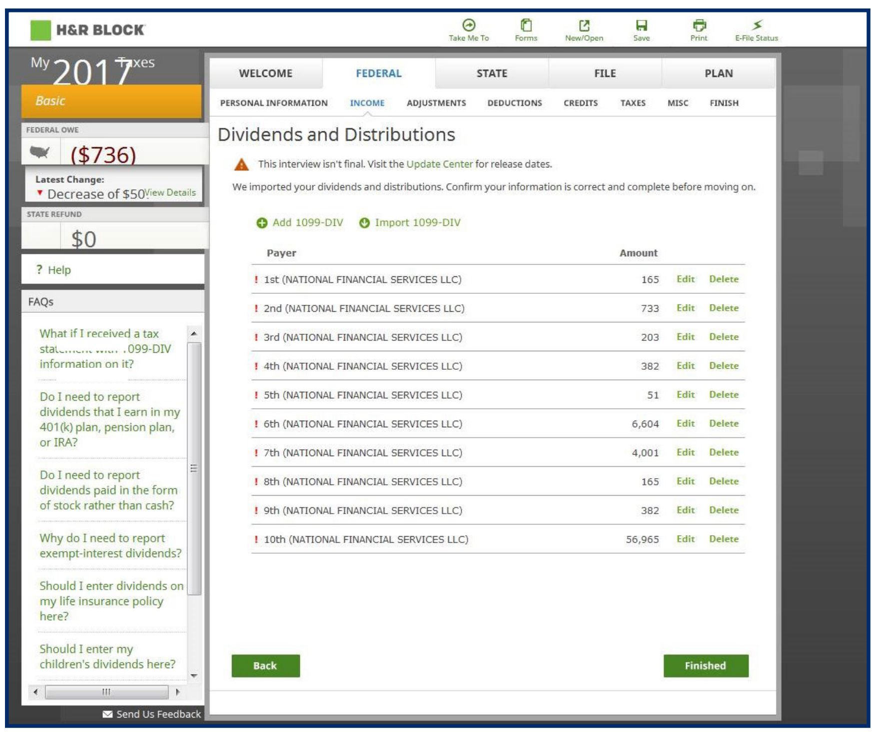
Step 5

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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