Users with active Wealthscape Investor IDs may import eligible tax forms into www.turbotax.com or www.hrblock.com for their online returns beginning on or about January 28, 2018.

The following current and corrected forms are eligible for import:

- 1099-B
- 1099-DIV
- 1099-INT
- 1099-MISC
- 1099-OID
- 1099-R

Importing into TurboTax® Online

To import information into TurboTax Online, follow the steps below:

1. Log into www.turbotax.com
2. On the TurboTax Welcome screen, click either **Start Return** or **Continue Return**. The TurboTax navigation bar appears. **Note**: If the customer has not used TurboTax in the past and no personal profile is available, TurboTax prompts the customer to establish a personal information profile.
3. On the TurboTax navigation bar, click **Federal Taxes**. The Federal Taxes page appears.
4. Under the Income level, click **Import Your Tax Info**. The Your Income page appears.
5. Chose **Yes** for the question, do you want to automatically get your tax info?
6. Chose **Directly from my Financial Institution** for the question, where do you want to import information from?
7. Select **National Financial** from the list of financial institutions and then click **Proceed with Import**
8. The sign-on screen appears
9. Enter Wealthscape Investor ID and PIN* and click **Continue**. The Tax Information screen appears displaying the tax information available to import.
10. Select only the accounts you want to include in the import process. **Note**: The tax information for brokerage accounts with trading authorization is also presented for import.
11. Click **Import Now** to import the tax information into your tax returns. The Import Successful screen appears indicating the import process is completed. To cancel the process, click **Skip Import**.

Importing into H&R Block® Online

To import information into H&R Block Online follow the steps below:

1. Log into www.hrblock.com
2. On the H&R Block Welcome screen, click **Start My Taxes**. **Note**: If the customer has not used H&R Block in the past and no personal profile is available, H&R Block prompts the customer to establish a personal information profile.
3. On the H&R Block navigation bar, click **Federal**. After the Get Started screen, click **Next** on the Last Year's Taxes screen to start your 2015 return.
4. Once you've completed entering your personal information, click on the Income icon
5. Choose the forms you would like to import
6. Select **National Financial Services** from the list of financial institutions and then click **Next**
7. The sign-on screen appears
8. Enter Wealthscape Investor ID and PIN* and click **Import**. The Tax Information screen appears displaying the tax information available to import.
9. Select only the accounts you want to include in the import process. Note: The tax information for brokerage accounts with trading authorization is also presented for import.
10. Click **Finish** to import the tax information into your tax returns. The Import Successful screen appears indicating the import process is completed. To cancel the process, click **Cancel**.