



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:

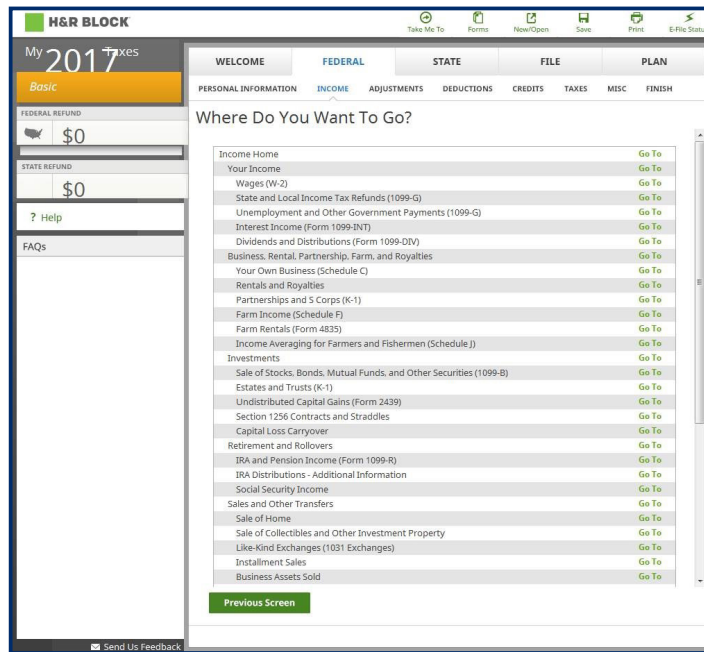
- The need to gather together a year's worth of statements
- The task of keying in data from multiple sources
- The worry associated with either missing or incorrectly transcribing important tax information

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

Here's how it works:

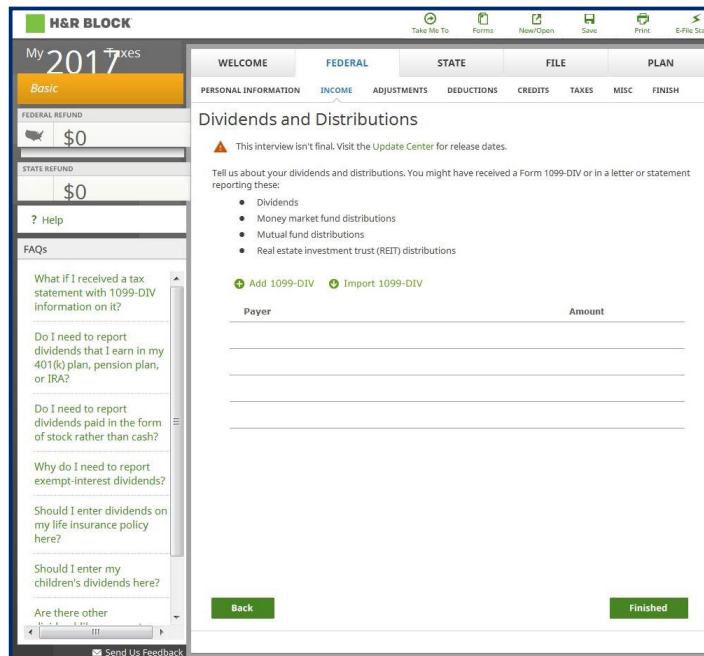
Step 1

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**.


The screenshot shows a software dialog box titled "IMPORT" with a "CLOSE X" button in the top right corner. The main heading is "Import from Financial Institutions" in green. Below the heading is a text input field labeled "Bank, broker or financial institution name" containing the text "Investor360". A dropdown menu is open below the input field, showing a single option "Investor360" highlighted in blue. 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


 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.

IMPORT CLOSE X

Success

We imported your Forms 1099-INT/OID as well as other Forms 1099 from **Investor360**.

Go through the Interview and edit each item to make sure your information is accurate and complete. Look for information with an exclamation point ! — that means you need to open the item and verify your information is correct.

Interest Income (1099-INT)

NATIONAL FINANCIAL SERVICES LLC	\$340
NATIONAL FINANCIAL SERVICES LLC	\$3140

Dividend Income (1099-DIV)

NATIONAL FINANCIAL SERVICES LLC	\$165
NATIONAL FINANCIAL SERVICES LLC	\$382
NATIONAL FINANCIAL SERVICES LLC	\$56965

Close

Step 6

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

H&R BLOCK

My **2017** Taxes

Basic

FEDERAL OWNE **(\$736)**

Latest Change: Decrease of \$50 [View Details](#)

STATE REFUND **\$0**

Help

FAQs

What if I received a tax statement with 1099-DIV information on it?

Do I need to report dividends that I earn in my 401(k) plan, pension plan, or IRA?

Do I need to report dividends paid in the form of stock rather than cash?

Why do I need to report exempt-interest dividends?

Should I enter dividends on my life insurance policy here?

Should I enter my children's dividends here?

Send Us Feedback

WELCOME **FEDERAL** **STATE** **FILE** **PLAN**

PERSONAL INFORMATION **INCOME** ADJUSTMENTS DEDUCTIONS CREDITS TAXES MISC FINISH

Dividends and Distributions

This interview isn't final. Visit the Update Center for release dates.

We imported your dividends and distributions. Confirm your information is correct and complete before moving on.

➕ Add 1099-DIV ➕ Import 1099-DIV

Payer	Amount	Edit	Delete
! 1st (NATIONAL FINANCIAL SERVICES LLC)	165	Edit	Delete
! 2nd (NATIONAL FINANCIAL SERVICES LLC)	733	Edit	Delete
! 3rd (NATIONAL FINANCIAL SERVICES LLC)	203	Edit	Delete
! 4th (NATIONAL FINANCIAL SERVICES LLC)	382	Edit	Delete
! 5th (NATIONAL FINANCIAL SERVICES LLC)	51	Edit	Delete
! 6th (NATIONAL FINANCIAL SERVICES LLC)	6,604	Edit	Delete
! 7th (NATIONAL FINANCIAL SERVICES LLC)	4,001	Edit	Delete
! 8th (NATIONAL FINANCIAL SERVICES LLC)	165	Edit	Delete
! 9th (NATIONAL FINANCIAL SERVICES LLC)	382	Edit	Delete
! 10th (NATIONAL FINANCIAL SERVICES LLC)	\$6,965	Edit	Delete

Back **Finished**

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

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