

Turbo Tax® Instructions

Hilliard Lyons is pleased to support the downloading of client tax information into the TurboTax® accounting software.

This download capability is available for Hilliard Lyons clients using Windows® versions of TurboTax® 2004-2009.

To register your account, you must first establish access to your Hilliard Lyons account at www.hilliard.com

When you access your account online, you will be able to register your account for Turbo Tax download from the pull-down menu selection "Get Started With Turbo Tax®"

You will be prompted to enter/select a password.
This password must contain 7 - 10 characters using a combination of letters and numerals.
Special characters ARE permitted.

To download your Hilliard Lyons tax information, open your copy of TurboTax® and select Hilliard Lyons from the list of institutions and follow the TurboTax® instructions from there.

TurboTax® will ask you for your username and password. *Reminder: Your user name is the same as your Hilliard Lyons account number.*

IMPORTANT NOTE: Once opened, the password page will expire after 5 minutes of inactivity. Please enter and save your password within this time allotment.