



# TurboTax<sup>®</sup> Import Instructions



**HILLIARD LYONS**

J.J.B. HILLIARD, W.L. LYONS, LLC | MEMBER NYSE, FINRA & SIPC

*By using the TurboTax<sup>®</sup> Import process, you are agreeing to the Hilliard Lyons Tax Information Import Terms and Conditions on Page 12.*

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# Introduction

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As a Hilliard Lyons client, you may import certain tax-related data from your Hilliard Lyons Tax Information Statement into the TurboTax® software. The following information is available for import: 1099-DIV, 1099-INT, 1099-MISC, 1099-OID, 1099-B, REMIC/WHMT and 1099-R (for Retirement Accounts).

## Benefits of TurboTax® Import Include:

- Secure, private user access to tax information via credentialing
- Fast, accurate data entry into tax returns
- Paperless electronic document delivery
- Ease in completion of tax forms
- Compliance with complex government regulations

**Important:** To import your tax information from Hilliard Lyons, you must have your Hilliard Lyons Tax Information Statement. Statements will be mailed to the postal address on file in mid-February. However, you may also download your statement from [www.hilliard.com](http://www.hilliard.com). Please log into your Hilliard Lyons account and select “View Tax Statement” from the Account Services menu.

The instructions provided will guide you through the process of downloading your Hilliard Lyons tax-related data. For TurboTax® software support, please direct questions to Intuit® at <http://turbotax.intuit.com/support/>.



# TurboTax® Online Users

**Note: The import instructions differ for TurboTax® online users versus those individuals who have opted to download the software to their MAC or PC.**

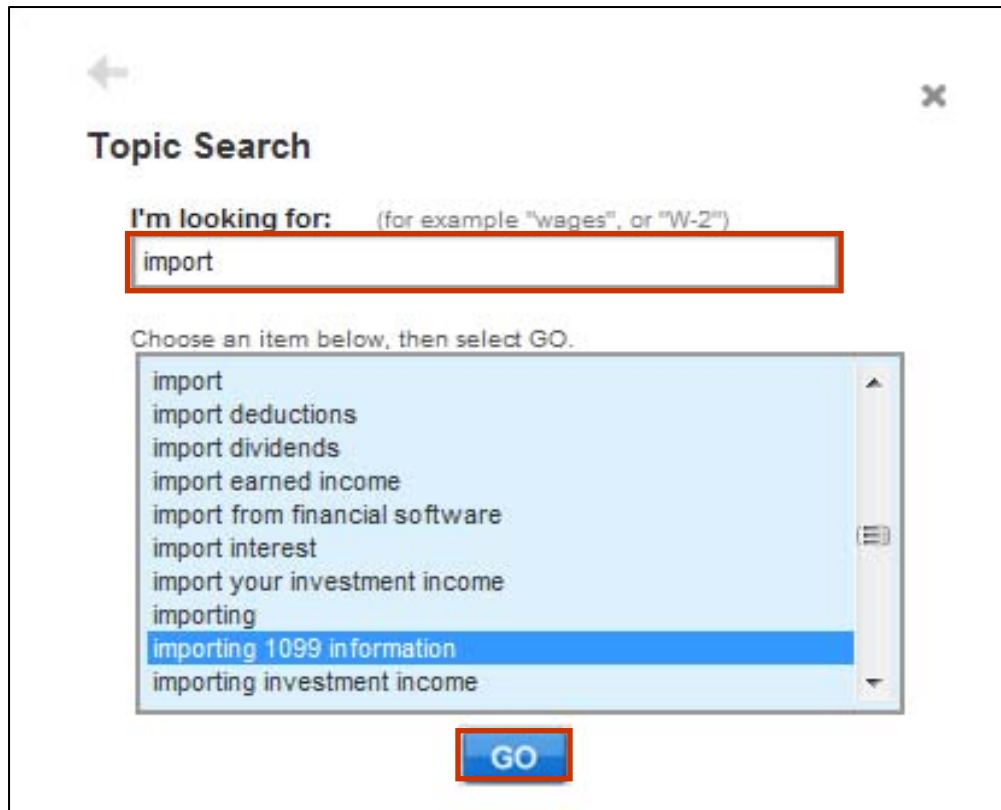
**Step 1)** In the TurboTax® Online access, select **Tools** in the upper right corner and then click **Topic Search** in the Tools Center window.

The screenshot displays the TurboTax Online interface. In the top right corner, the 'Tools' menu item is highlighted with a red box. Below the main navigation, a search bar contains the text 'Ask a question, such as "What is a W-2?"' and an 'Ask' button. On the left side, the TurboTax Deluxe logo is visible, along with a '\$0 Federal Refund' indicator. The main content area features a 'Hi, welcome to TurboTax!' message and a 'Start' button. An inset window titled 'Tools Center' is shown, with the 'Topic Search' button highlighted by a red box. Other buttons in the Tools Center include 'Topic List' and 'My Fees'. Below the Tools Center, there is a section for 'Other helpful links...' with a link to 'View Tax Summary'.

# TurboTax® Online Users cont.

**Step 2)** Type “import” in the I’m looking for field.

**Step 3)** Scroll through the list to find the specific topic you want (for example, “importing 1099 information” or “importing investment income”) and then click **Go**.



← ×

### Topic Search

I'm looking for: (for example "wages", or "W-2")

Choose an item below, then select GO.

- import
- import deductions
- import dividends
- import earned income
- import from financial software
- import interest
- import your investment income
- importing
- importing 1099 in formation**
- importing investment income

**GO**

# TurboTax® Online Users cont.

**Step 4)** Click on **Add Other Documents** in order to import tax data from the following documents: 1099-B, 1099-DIV, 1099-INT, 1099-OID, and 1099-R.

**Import Summary**

Currently, you do not have any imported documents in your return. [Importing documents](#) saves you time and reduces data entry errors.

To import, choose what you want to enter into your return:

<a href="#">Add W-2</a>	These documents come from your employer's payroll service provider and report wages paid to employees.
<a href="#">Add Other Documents</a>	Documents that TurboTax can import from banks and brokerages include 1099-B, 1099-DIV, 1099-INT, 1099-OID, 1099-R, and 1098 Mortgage Interest Statement.

We can retrieve forms such as 1099-INT and 1099-DIV directly from your banks and brokerages and enter them into your tax return for you. By partnering with [hundreds of financial institutions](#), we're able to [import](#) your information so you don't have to type it in. Importing is safe, fast and accurate. [Learn more](#) about importing large numbers of stock sales.

How do you want to enter your documents into your return? [Safe and Secure](#)

Import from my bank or brokerage

Import from my Mint.com account [Explain This](#)

I'll type it in myself

Hilliard

Select an item below.

- Harbor Funds
- Harrisdirect
- Hartford Mutual Funds, The
- Hefren-Tillotson, Inc.
- Hilliard Lyons (JJB Hilliard, WL Lyons, LLC)

[Back](#) [Manage Import Options](#) [Continue](#)

**Step 5)** Type “Hilliard Lyons” in the search bar. Select “Hilliard Lyons (JJB Hilliard, WL Lyons, LLC)” from the drop-down list and click **Continue**.

# TurboTax® Online Users cont.

To import your information, you will need to enter your credentials so TurboTax® can recognize you and validate your access to your account information.

**Step 6)** Key in your Hilliard Lyons **Account Number** and **Document ID** and click **Continue**.

Your Hilliard Lyons **Account Number** and **Document ID** can be found on your Tax Information statement.

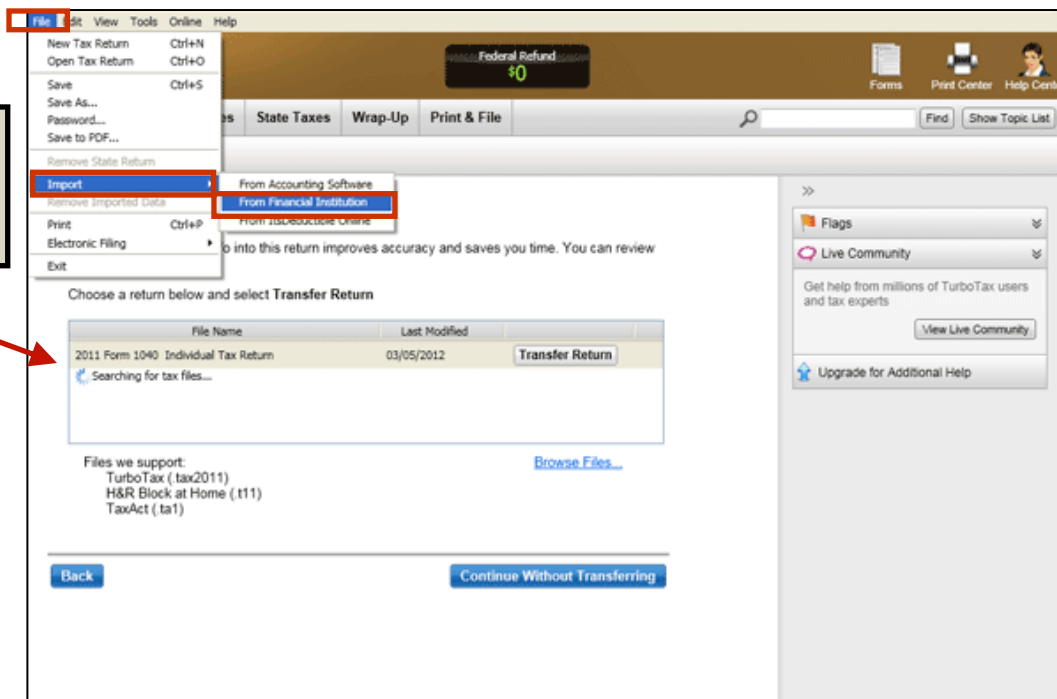
<p><b>HILLIARD LYONS</b> J.J.B. HILLIARD, W.L. LYONS, LLC   MEMBER NYSE, FINRA &amp; SIPC</p> <p>500 West Jefferson Street Suite 700 Louisville, KY 40202 Customer Service: 800-588-1598</p> <p>PAYER'S Federal ID No: 26-2333067</p>	<p><b>Tax Information</b></p> <p><b>Account 12345678</b></p>	<p>Statement Date: XX/XX/XXXX</p> <p><b>Document ID: 1234567-890</b></p>
	<p>CLIENT NAME CLIENT ADDRESS CITY, STATE ZIP CODE</p> <p>RECIPIENT'S ID No: XXX-XX-XXXX</p>	<p><b>YOUR FINANCIAL CONSULTANT</b></p> <p>CONSULTANT NAME CONSULTANT PHONE NUMBER Office Code: Rep Code:</p>

# TurboTax® CD/Download Software Users

**Note: The import instructions differ for TurboTax® online users versus those individuals who have opted to download the software to their MAC or PC.**

**Step 1)** From the **File** menu, select **Import**, and then select **From Financial Institution**.

After you select **From Financial Institution**, wait a moment while TurboTax® updates the list.

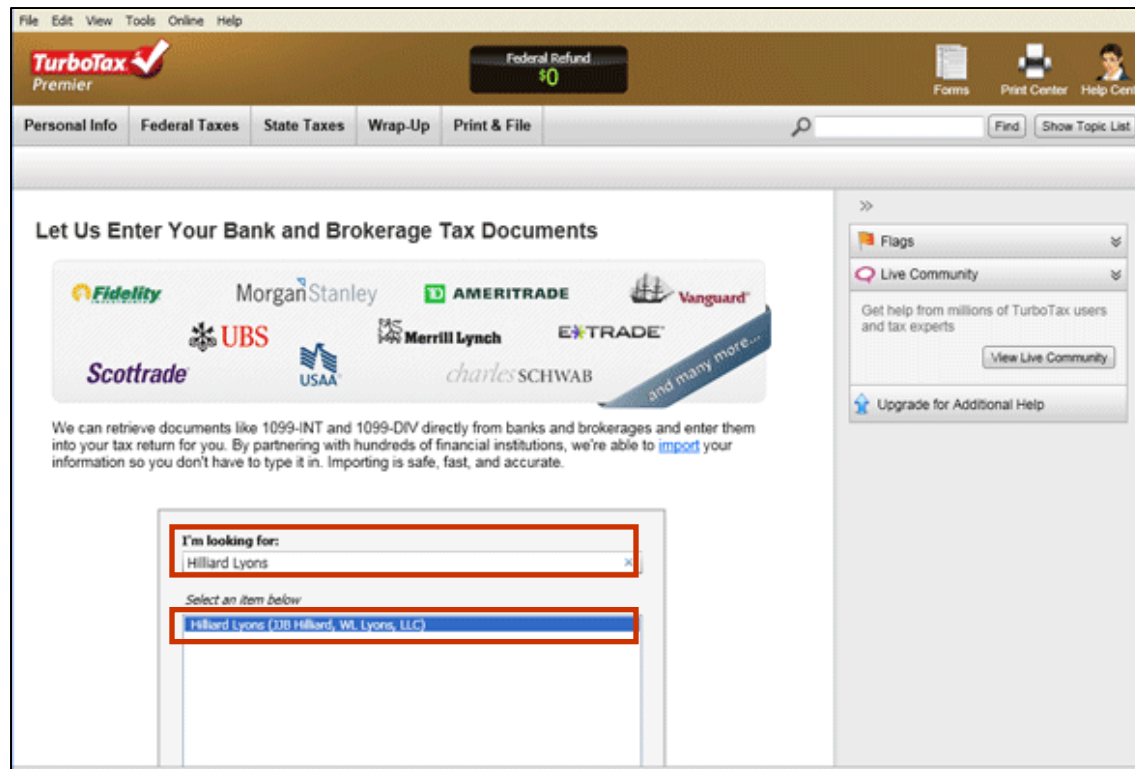




# TurboTax<sup>®</sup> CD/Download Software Users cont.

**Step 2)** Type “Hilliard Lyons” in the I’m looking for field.

**Step 3)** Select “Hilliard Lyons (JJB Hilliard, WL Lyons, LLC)” from the drop-down list and click **Continue**.




# TurboTax® CD/Download Software Users cont.

To import your information, you will need to enter your credentials so TurboTax® can recognize you and validate your access to your account information.

**Step 4)** Key in your Hilliard Lyons **Account Number** and **Document ID** and click **Continue**.

Your Hilliard Lyons **Account Number** and **Document ID** can be found on your Tax Information statement.

 <b>HILLIARD LYONS</b> <small>J.J.B. HILLIARD, W.L. LYONS, LLC   MEMBER NYSE, FINRA &amp; SIPC</small> 500 West Jefferson Street Suite 700 Louisville, KY 40202 Customer Service: 800-588-1598  PAYER'S Federal ID No: 26-2333067	<b>Tax Information</b> <b>Account 12345678</b>	Statement Date: XX/XX/XXXX <b>Document ID: 1234567-890</b>
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# TurboTax® Online Support

TurboTax® Online support can be found at <http://turbotax.intuit.com/> under the **Support** tab, located in the upper right-hand side of the screen.

Key in the topic that you need help with and click **Search**.

The search results will appear with a list of articles related to the topic, including frequently asked questions.

The screenshot displays the TurboTax website's support interface. At the top, the TurboTax logo and navigation menu are visible, with the 'Support' tab highlighted. A search bar contains the text 'import 1099', and a 'Search' button is located to its right. Below the search bar, a list of search results is shown, including articles such as 'Importing Your W-2, 1099, and 1098 Forms', 'Choose which 1099 forms to import', and 'TurboTax won't replace previously-imported, edited 1098 and 1099 forms when re-importing'. The page also features a sidebar with navigation options like 'Shopping & Buy', 'Download & Install', 'Getting Started', 'Preparing My Tax', 'Printing & Filing', and 'After Filing'.

# TurboTax® CD/Download Software Support

TurboTax® offers several types of assistance for their customers:

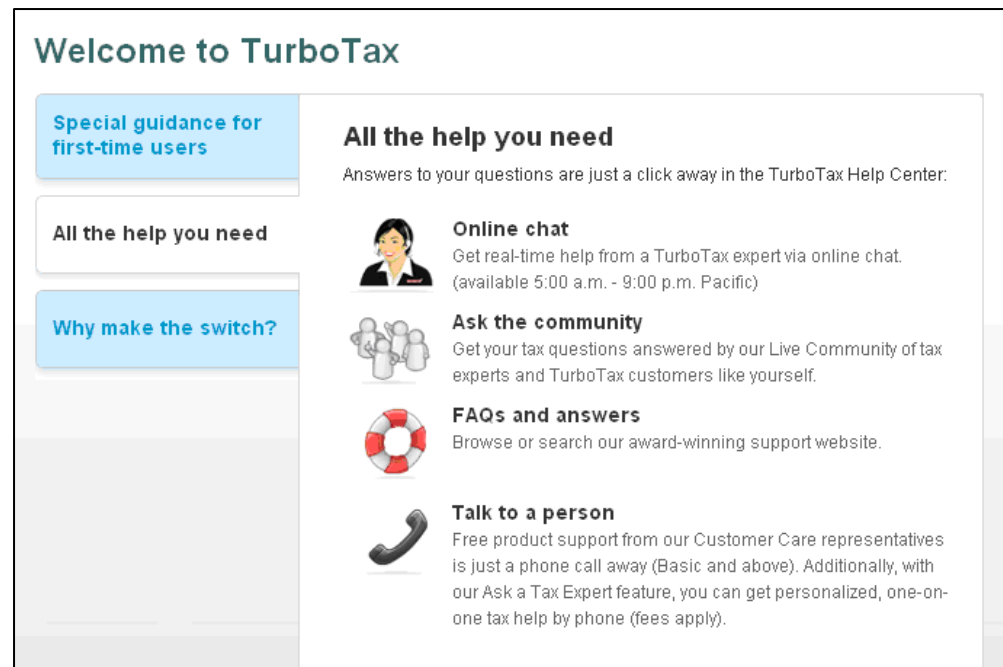
## Help Center

Located in the upper right-hand corner of the screen, TurboTax® displays a blue icon for the Help Center, which provides an array of resources, both in-product and publications, tailored to the screen in which the user currently has displayed.

## Live Community

On the right-hand side of the screen, Live Community offers a real-time way to pose a question to millions of TurboTax® users and experts and look at answers already received to similar questions.

Live chat and phone support are also available for TurboTax® customers.



The screenshot shows the TurboTax Help Center interface. At the top, it says "Welcome to TurboTax". Below this, there are several navigation options in a sidebar: "Special guidance for first-time users", "All the help you need", and "Why make the switch?". The main content area is titled "All the help you need" and includes the text "Answers to your questions are just a click away in the TurboTax Help Center:". Below this, there are four support options, each with an icon and a brief description: "Online chat" (with a person icon), "Ask the community" (with a group of people icon), "FAQs and answers" (with a lifebuoy icon), and "Talk to a person" (with a telephone handset icon).

# Terms and Conditions

*Hilliard Lyons can provide assistance and support for information appearing on your 1099 documents. For support with use of your TurboTax® software, please contact TurboTax® for assistance.*

*TurboTax® is a registered trademark of Intuit Inc. and is used with permission.*

*TurboTax® and TurboTax® Online, among others, are registered trademarks and/or service marks of Intuit Inc. in the United States and other countries. Intuit Inc. is not affiliated with Hilliard Lyons and is solely responsible for the information provided by Intuit Inc. for users of TurboTax® software. Hilliard Lyons cannot guarantee that Intuit Inc. supplied information and content are accurate, complete, or timely and makes no warranties, conditions, guarantees, or representations regarding the results obtained from such use.*

*It is important to understand that the tax information imported into TurboTax® products may not be all of the information required for you to properly complete the investment income portion of your federal and/or state tax return. It is essential that you complete the TurboTax® Interview and/or Review processes in their entirety to ensure that all imported information is correctly reported to the IRS and/or the state(s) to which you report.*

*Be sure to verify the information that you import with your own records in order to ensure accurate and complete reporting of all required tax information on your federal and/or state tax return(s). Although Hilliard Lyons is providing the tax information import as an additional service, Hilliard Lyons does not guarantee that the information provided is sufficient for tax reporting purposes, and Hilliard Lyons is not liable for your reliance upon or use of the import feature or the data provided through such feature. If you have specific questions regarding the preparation of your tax return, contact your tax advisor, the IRS, or the state(s) to which you report.*

*The printed Hilliard Lyons 1099 tax forms are the official record of 1099 information maintained at Hilliard Lyons. Hilliard Lyons disclaims any liability arising from the use of TurboTax® software or the content furnished by Intuit Inc., including but not limited to, any resulting information obtained from such use, or interpretations of information made as a result of such use.*



# Questions?

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If you need assistance, please contact your Hilliard Lyons Financial Consultant.

A directory of Hilliard Lyons Financial Consultants can be found on our corporate website at [www.hilliard.com](http://www.hilliard.com) under [Branch Office Listing](#).