

## Importing 1099 Tax Documents

You must have online access to your account via **NetXInvestor (Pershing)**. To establish electronic delivery of your documents, you can contact your Advisor, call us at 800-646-0285, sign up at [www.NetXInvestor.com](http://www.NetXInvestor.com) or [click here](#) for the User ID and Electronic Delivery Request form and mail it to us.

### **Turbo Tax**

If you have not already started your TurboTax return, select **New Tax Return** from the **File** menu in TurboTax.

1. From the **File** menu select **Import** and then select **From Financial Institution**.
2. In the box labeled **I'm looking for:** type **NetXInvestor**.
3. Select **NetXInvestor (Pershing)** from the scrolling list and click **Continue**.
4. Sign on using your **NetXInvestor** ID and password (if prompted for financial institution number, type in 6QE) and click **continue**.
5. Your tax forms will appear on the **These Documents Are Now Ready for Import** screen. To view the details of each document, click **View Details** to the right of the document. A dialog box will appear detailing the items TurboTax will import; when you are finished reviewing the details, select **Close** to return to **These Documents Are Now Ready for Import** screen.
6. Click **Import Now** to import the selected items into your TurboTax return (a dialog box will appear to let you monitor the status of the download).
7. From the **Import Summary** screen, select **Done**.
8. Click **Continue** to begin the TurboTax interview process.

If you cannot import your tax forms, call Turbo Tax at 888-777-3066 or visit their support website at <https://support.turbotax.intuit.com/contact/>

### **H&R Block**

1. Click on **Import**
2. Select **NetXInvestor (Pershing)** from the drop down box of financial institutions.
3. When prompted, enter your **NetXInvestor** ID, password and financial institution number (6QE).
4. The program will import all information from the 1099.
5. When completed you should see the word **Success**.

If you cannot import your tax forms, call H&R Block at 800-472-5625 or visit their support website at <https://www.hrblock.com/support/>