

H&R BLOCK® USERS IMPORT GUIDE

Clients can import tax data from their Janney Montgomery Scott accounts directly into the H&R Block® program. The imported tax data will be automatically populated in the necessary fields within the H&R Block® software. The tax data includes information from Forms 1099-R, 1099-B, 1099-DIV, 1099-INT, 1099-MISC, and 1099-OID. Below are instructions on how to import tax data into the H&R Block® software after receiving your tax documents.

Clients should verify information imported into the H&R Block® program against the client's own records to ensure accurate and complete reporting.

H&R Block® Instructions

1. Clients must install and open the H&R Block® program. If clients do not have the program, they may visit www.hrblock.com to acquire the program software or use the web-based program.
2. H&R Block® will walk the client through the necessary steps to complete the tax return. Clients will then have the ability to import documents. The button “Had Investments” should display. Use this to import tax form data.
3. Search for Janney Montgomery Scott LLC, select the name, and hit Next. **3**
4. The box **4** will give the client the option to input the Account Number and Document ID.
5. Clients will be able to find their Account Number and Document ID on the top right of their tax forms, as shown in **5**. Input the information into these sections and hit Next.
6. H&R Block® will now import the information into the program.

It is important for clients to verify information that has been imported into the H&R Block® program against client's own records to ensure accurate and complete reporting of tax information. H&R Block®, its programs and software are not owned or operated by Janney Montgomery Scott LLC.

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OVERVIEW FEDERAL STATE FILE

What's your financial institution?
If yours isn't shown, click Other.

Capital One NATIONAL FINANCIAL A Fidelity Investments Company Fidelity charles SCHWAB CHASE Other

Financial institution: Ja X
Janney Montgomery Scott LLC

Cancel Next

4

OVERVIEW FEDERAL STATE FILE

Import From Janney Montgomery Scott LLC

Janney

To import your Janney Montgomery Scott, LLC. tax information, enter your Account Number and the Document ID located on your 1099 tax statement. For questions regarding your 1099 tax statement, please contact your Financial Advisor.

Please contact your Financial Advisor or visit www.janney.com/taxes for questions regarding authentication.

If you need additional help, visit the Janney Montgomery Scott LLC [support site](#).

Account Number: _____

Document ID: _____

Cancel Skip Import Import

5 Tax Information

| | | |
|------------------|----------------------------|------|
| Account 88888888 | Statement Date: mm/dd/yyyy | 20xx |
| | Document ID: 123A 456 B789 | |

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IN FINANCIAL RELATIONSHIPS

