

H&R BLOCK® USERS IMPORT GUIDE



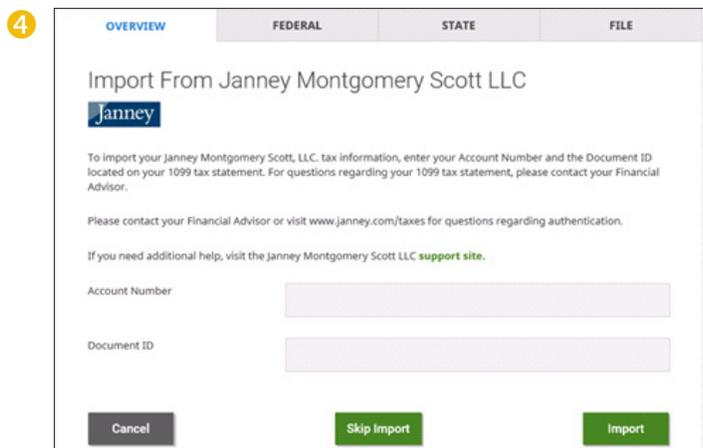
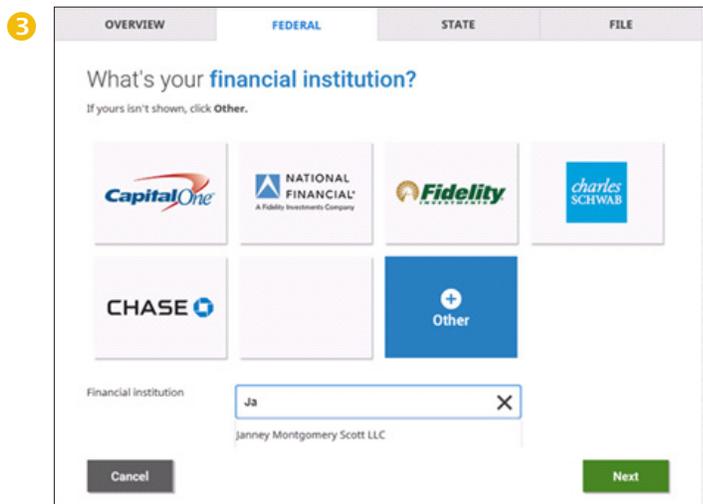
Import tax data from your Janney accounts directly into the H&R Block® tax software. The imported data will be automatically populated in the necessary fields within the software. The tax data includes information from Forms 1099-R, 1099-B, 1099-DIV, 1099-INT, 1099-MISC, and 1099-OID. Below are instructions.

Verify information imported into the H&R Block® software against your records to ensure accurate and complete reporting.

H&R BLOCK® INSTRUCTIONS

1. Install and open the H&R Block® program. If you do not have the software, you may visit www.hrblock.com to download the program software or use the web-based program.
2. H&R Block® will walk you through the necessary steps to complete your tax return and you 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**.
4. The box will give you the option to input the Account Number and Document ID.
5. Locate your Account Number and Document ID on the top right of your tax forms, as shown in . Input the information into these sections and hit **Next**.
6. H&R Block® will now import the information into its 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.



5	Tax Information Account 88888888	Statement Date: mm/dd/yyyy Document ID: 123A 456 B789	20xx
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