

# TURBOTAX® USERS IMPORT GUIDE



Clients can import tax data from their Janney Montgomery Scott accounts directly into Intuit’s TurboTax® program. The imported tax data will automatically populate the necessary fields within the TurboTax® 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 TurboTax® software after receiving your tax documents.

Clients should verify information imported into the TurboTax® program against the client’s records to ensure accurate and complete reporting.

## TURBOTAX® INSTRUCTIONS

1. Clients must install and open the TurboTax® program. If clients do not have the program, they may visit [www.turbotax.com](http://www.turbotax.com) to acquire the program software or use the web-based program.
2. TurboTax® will walk the client through the necessary steps to complete the tax return. Clients will then have the ability to import documents. The button “Add Other Documents” should display. Use this to import tax form data.
3. Search for Janney Montgomery Scott LLC, select the name, and hit Continue. **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. TurboTax® will now import the information into the program.

**3**

**I'm looking for:**

Select an item below

Janney Montgomery Scott LLC

**4**

**Sign on to Janney Montgomery Scott LLC**

Sign on to your Janney Montgomery Scott LLC account as you normally would. ONLY tax-related items will be imported.

**Account Number:**

**Document ID:**

**5**

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

It is important for clients to verify information that has been imported into the TurboTax® program against client’s records to ensure accurate and complete reporting of tax information. TurboTax®, its programs, and software are not owned or operated by Janney Montgomery Scott LLC. TurboTax® is a registered trademark of Intuit Inc.