

TURBOTAX® USERS IMPORT GUIDE



Import tax data from your Janney accounts directly into Intuit’s TurboTax® software. The imported data will automatically populate 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 TurboTax® software against your records to ensure accurate and complete reporting.

TURBOTAX® INSTRUCTIONS

1. Install and open the TurboTax® program. If you do not have the program, visit www.turbotax.com to download the program software or use the web-based program.
2. TurboTax® will walk you through the necessary steps to complete your tax return. You 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 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 5. Input the information into these sections and hit **Next**.
6. TurboTax® will now import the information into its program.

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I'm looking for:

Select an item below

Janney Montgomery Scott LLC

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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:

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Tax Information	Statement Date: mm/dd/yyyy	20xx
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.