

# eDelivery and TurboTax®

Combining two solutions to help simplify your filing process this tax season

You can take advantage of a powerful combination of solutions that can help you experience a smoother filing process this tax season. The combination of an efficient eDelivery feature coupled with the many advantages of TurboTax® can help you save time, reduce paperwork eliminate errors, and streamline your tax-preparation process this year.

## Go paperless with eDelivery of tax forms

You can simplify your life during tax season and reduce clutter by taking advantage of eDelivery of your tax forms. It helps with your recordkeeping and the electronic storage of your forms, reduces the amount of paper you receive in the mail during tax season, and protects you from identity theft with less of your personal information on paper.

With eDelivery of tax forms, you can take advantage of the following features:

- Next-day notification of available documents
- 24/7 online access to up to seven rolling years of tax forms
- An enrollment process that is quick and intuitive

Follow these easy steps to sign up for eDelivery of your tax forms:

- Sign on to [WealthscapInvestor.com](https://WealthscapInvestor.com).
- From the Accounts drop-down menu, select an Investment Account and click *Account Profile*.
- Select the Account Characteristics menu and click *Edit*.
- Enter a valid email address under Account Holders.
- In the Document Delivery Instructions, you need to select Online for Tax Forms and Related Documents in the drop-down menu, as well as any other document type you would like to have electronically delivered.
- Click Save *Edits*.

## Enjoy the potential time-saving features of TurboTax®

Preparing federal income taxes can be complicated. Whether you do your own returns or work with a professional tax preparer, you may be able to simplify the process by taking advantage of the features

of TurboTax®. This solution enables you to import documents into your tax return quickly and easily, helping to save time, streamline your tax preparation, and ensure your data entry is accurate.

According to TurboTax®, you get the following features:

- Secure and private access to your tax information
- Fast and accurate data entry into your tax return
- A paperless electronic document delivery process
- An easy way to complete you tax form that is compliant with complex government regulations

Once you've determined TurboTax® is right for you, follow these easy steps to sign up for TurboTax® online:

- Visit [www.turbotax.com](http://www.turbotax.com) and click either *Start Return* or *Continue Return*.  
Note: If you haven't used TurboTax® in the past and no personal profile is available, TurboTax® will prompt you to establish a personal information profile.
- Click *Federal Taxes* on the TurboTax® navigation bar.
- Click *Import Your Tax Info* under Income Level.
- Select National Financial from the list of financial institutions and click *Proceed with Import*.  
Note: You can import tax information from other participating financial institutions listed on this screen.
- Enter your WealthscapInvestor user ID and PIN in the sign-on screen and click *Continue*; the tax information available for import will be displayed.
- Select only the accounts to be included in the import process.
- Click *Import Now* and the Import Successful screen will appear, indicating when the process is completed.
- To cancel the process, click *Skip Import*.

## For more information, call your advisor.

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