

## IMPORT TAX DATA FROM YOUR RAYMOND JAMES ACCOUNTS DIRECTLY INTO TAXACT® TAX FILING SOFTWARE

Tax data imports include the information from Forms 1099-B, 1099-DIV, 1099-INT, 1099-OID and 1099-MISC.

Downloading your tax data into the software assists you in automating the process of having to determine which information needs to be entered into specific fields.

To use the service, simply follow the steps outlined below by choosing “Raymond James” from brokerage or software vendor drop-down menu in TaxACT®, then enter the account number and document identification number printed on your composite Form 1099 statement as directed. This “key” provides access to import Form 1099-B. It is recommended that you review your tax information to ensure the upload was successful.

### **BASIC INSTRUCTIONS:**

To import your Raymond James account information into TaxACT®, follow the steps below.

1. Click on the **Federal Q&A** tab
2. Click **Investment Income** to expand the section, then click **Gain or loss on the sale of investments**
3. Click **Stock Data Import**
4. Click **Electronic Import**
5. Select **Raymond James** from the *Brokerage or software vendor* drop-down menu
6. Enter your account number and document ID, then click **Continue**

TaxACT® offers several versions of software with different levels of service. Available levels include (fees may apply):

- Federal Free – Free to prepare, Free to print, Free to e-file and supports 1040, 1040A & 1040EZ.
- Deluxe – Walks through your taxes with 100% accuracy guarantee while finding all deductions & credits for the largest possible refund.
- Ultimate Bundle – Offers federal and a state filing, free tax/audit help and provides free phone support.

**SUPPORT:**

For assistance with TaxACT® login please visit [www.taxact.com/support/22649/raymond-james---electronic-import](http://www.taxact.com/support/22649/raymond-james---electronic-import).

For assistance with your Raymond James tax documents, please contact your Cornerstone Client Relations Associate at 605-357-8553 in Sioux Falls or 605-352-9490 in Huron, or Raymond James Client Services at 800-647-SERV(7378).

For a list of frequently asked questions and other helpful topics please visit [www.taxact.com](http://www.taxact.com) and choose the support tab located at the top of the page.

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