|  |
| --- |
| 1. When arriving at the section ***Let Us*** ***Enter Your1099-INT***, select ***Import from my bank or brokerage*** and click ***Continue.*** |
| 1. Enter “NetXInvestor” into the search field, then select ***NetXInvestor (Pershing) Formerly NetXClient*** from the list of firms and click ***Continue***. |
| 1. In the ***Financial Institution Number*** box, enter “HWA” 2. Enter your NetXInvestor User ID and Password, then click ***Continue***.      1. After clicking ***Continue***, the data from the account will import into your TurboTax system. You are responsible for ensuring the accuracy of the information. |
|  |

|  |
| --- |
| **Having Trouble?** |
| Please call our office at 408-963-2874 or  Email Fatima Franco at [ffranco@wradvisors.com](mailto:ffranco@wradvisors.com) |