

# How to: Import Tax Data into TurboTax® or H&R Block®



As a First County Advisor client, you may be able to import details from your tax forms into programs from TurboTax and H&R Block – saving you time and ensuring accuracy!

## Frequently Asked Questions

*What can I import?*

For non-retirement accounts, you may import Forms 1099 DIV/INT/B & 1099-MISC. For retirement accounts, you may import your 1099-R.

*How does it work?*

Using your unique Tracking ID found at the bottom of your Tax Information Statement, your tax information will be automatically mapped into the appropriate fields on your tax form.

*Can my tax advisor use this feature?*

Yes! If your tax advisor uses TurboTax or H&R Block they can import your tax information.

*What if I have difficulties?*

If you have questions, or difficulties with the import, please call your Advisor, or visit [FirstCountyAdvisors.com](http://FirstCountyAdvisors.com) for step-by-step screenshots and how to's.

*Can I import into other programs?*

Unfortunately, the ability to import your tax data is limited to TurboTax and H&R Block at this time.

## How to Import Your Information

Once you've received your Form 1099, you are ready to get started, following these simple steps to import your data for tax filing:

### TURBOTAX

1. Select the type of form you are looking to import.
2. Search for and select First County Advisors (be aware of similar looking names).
3. Add in the Tracking ID Number found at the bottom of your 2019 tax information statement, with your Social Security Number (or Tax ID Number) to access your tax information.

### H&R BLOCK

1. Click "Interest, Dividends, and Capital Gain Distributions," and select the type of form you are looking to import.
2. Search for and select First County Advisors (be aware of similar looking names).
3. Add in the Tracking ID Number found at the bottom of your 2019 tax information statement, with your Social Security Number (or Tax ID Number) to access your tax information.

If you have multiple accounts, all related tax form data for your Tax ID Number (TIN) should be imported at the same time.