



Touchstone Investments®  
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## Importing Tax Data into TurboTax®

As a **Touchstone Investments** (Touchstone) customer if you choose to use TurboTax, you may be able to import certain information directly from your account to TurboTax.

### What Information You Can Import:

For non-retirement accounts, you may import Forms 1099-B and 1099-DIV. For Retirement accounts, you may import your 1099-R.

**Important note:** in order to download tax forms to TurboTax you must first elect electronic delivery of tax forms via the Touchstone website. To complete this election, visit <https://nge01.bnymellon.com/NextGenV4/dflt/Login.tou> and click on the appropriate Sign-On option for your account(s) and once you have completed your sign-on, click on the User Options link in the left hand column and follow the instructions to complete the Electronic Delivery of tax forms election.

### Getting Started

The instructions below will provide the steps to assist you with importing your Touchstone tax-related data into TurboTax. Touchstone does not support the TurboTax software; for a list of common questions and answers, please refer to [TurboTax's common questions and answers](#) page.

If you have questions about your Touchstone tax documents, please contact your financial professional or call one of our Client Service Representatives at 800.543.0407 Monday through Friday between the hours of 8:30 am and 7:00 pm EST.

***Please read the Terms and Conditions below before importing your tax documents.***

### How to Import Your Information

Once you receive your Form-1099, have it available to verify the important information and follow these simple steps.

1. If you have not already started your TurboTax return, select **New Tax Return** from the **File** menu in TurboTax.
2. From the **File** menu select **Import** and then select **From Financial Institution**.
3. In the box labeled **I'm looking for:** type **'Touchstone'**
4. Select **Touchstone** from the scrolling list box and click **Continue**.
5. From the Sign on to **Touchstone** screen:
  - Enter your **Touchstone** Account Number (do not include any fund trading symbol)

- Enter your **formatted Social Security Number** (or EIN tax payer id for trust accounts) including dashes (eg., XXX-XX-XXXX format for SSN's or XX-XXXXXXX for EIN's).

Click **Continue**.

6. Your tax forms will appear on the **These Documents Are Now Ready for Import** screen. To view the details of each document, click **View Details** to the right of the document. A dialog box will appear detailing the items TurboTax will import; when you are finished reviewing the details, select **Close** to return to **These Documents Are Now Ready for Import** screen.
7. Click **Import Now** to import the selected items into your TurboTax return (a dialog box will appear to let you monitor the status of the download). From the **Import Summary** screen, select **Done**.
8. Click **Continue** to begin the TurboTax interview process.

If you have multiple accounts, all related tax form data for your tax id number should be imported in the above single step.

### **Terms and Conditions**

Touchstone does not provide tax advice. Please consult a tax professional for advice specific to your individual circumstances.

**Important:** Be sure to verify that the imported information matches the information contained in the tax forms provided by Touchstone. The tax data provided for the import is an additional service and there is no guarantee that it is sufficient for tax reporting purposes. Touchstone is not liable for your reliance upon or use of the import feature or the data provided through such feature. If you have specific questions regarding the preparation of your tax return, contact your tax professional, the IRS, or the state(s) to which you report.

It is important to understand that the tax information imported into TurboTax products may not be all of the information required for you to properly complete the investment income portion of your federal and/or state tax return. It is essential that you complete the TurboTax Interview and/or Review processes in their entirety to ensure that all imported information is correctly reported to the IRS and/or the state(s) to which you report.

**Before using this information, review the important legal information and terms of use:**

Intuit

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