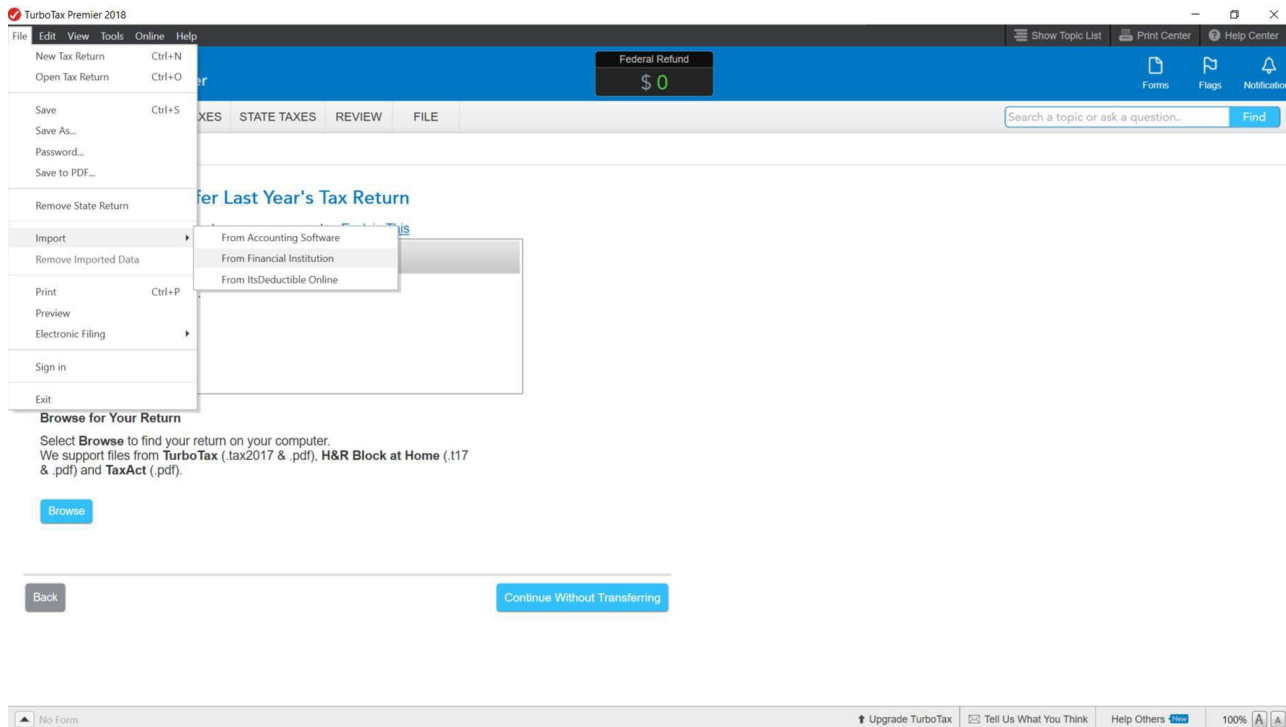


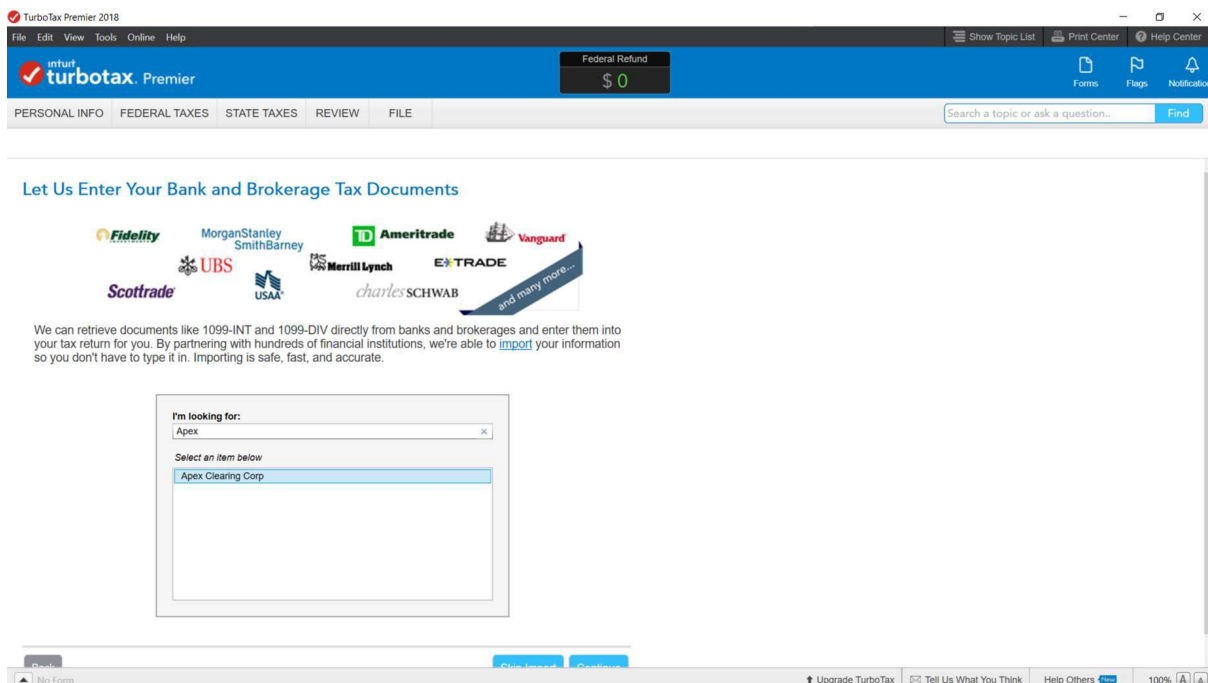
TurboTax Import Functionality



In order to help prepare you and your customers for the upcoming tax season, Apex is providing the following summary of Intuit's on-screen instructions for TurboTax. We hope this will help you familiarize yourself with the TurboTax import function so you will be better prepared to assist your customers.



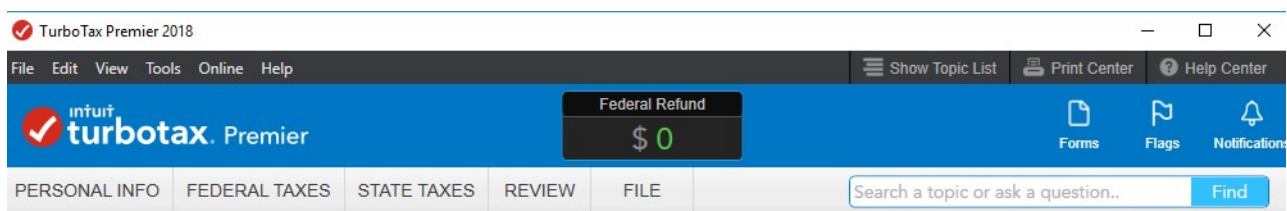
1. After starting a new return from the File menu, select Import, then From Financial Institution.
2. On the next screen, type "Apex" into the field titled "I'm looking for" and then select 'Apex Clearing Corporation.' Click Continue.



TurboTax Import Functionality

3. Next, the customer will be presented with a login screen. The customer's login credentials are predetermined by their level of access to Apex Online. If your customer already uses Apex Online, then they will use those credentials to import their Consolidated 1099 data into TurboTax. If your customer does not utilize Apex Online, then they will need to follow the following steps.

- In the Apex User ID field, the customer will need to enter their account number. For example, account XXX-12345 would enter XXX12345 as their username.
- In the Apex Password field, the customer will enter the Tax ID number that is associated with the account. For most customers, this will be their Social Security Number; however, if the customer's account is an entity account, then it may be a Tax ID number.
- Click Continue.




Sign on to Apex Clearing Corp

APEX Clearing™

Sign on to your Apex Clearing Corp account as you normally would. Only data relevant to your tax return will be imported.

Apex User ID

Apex Password

 We keep your information completely secure.
[Learn more about security](#)

If you have an Apex Online account enter your User ID and Password. Otherwise, Enter 10- plus your account number as the Apex User ID. Enter the tax ID number that is associated with your account as the Apex Password. By accepting and using the import capability provided by Apex, you assume full responsibility for the accuracy of your tax return. It is essential that you verify the information prior to submitting your tax return to the IRS. For further assistance, please e-mail tax@apexclearing.com or click here: apexclearing.com.



4. Once the customer selects Continue and their login credentials are validated, they will be presented with a screen identifying which forms and information is available for import. They will then follow the on-screen instructions to select the information they wish to include.