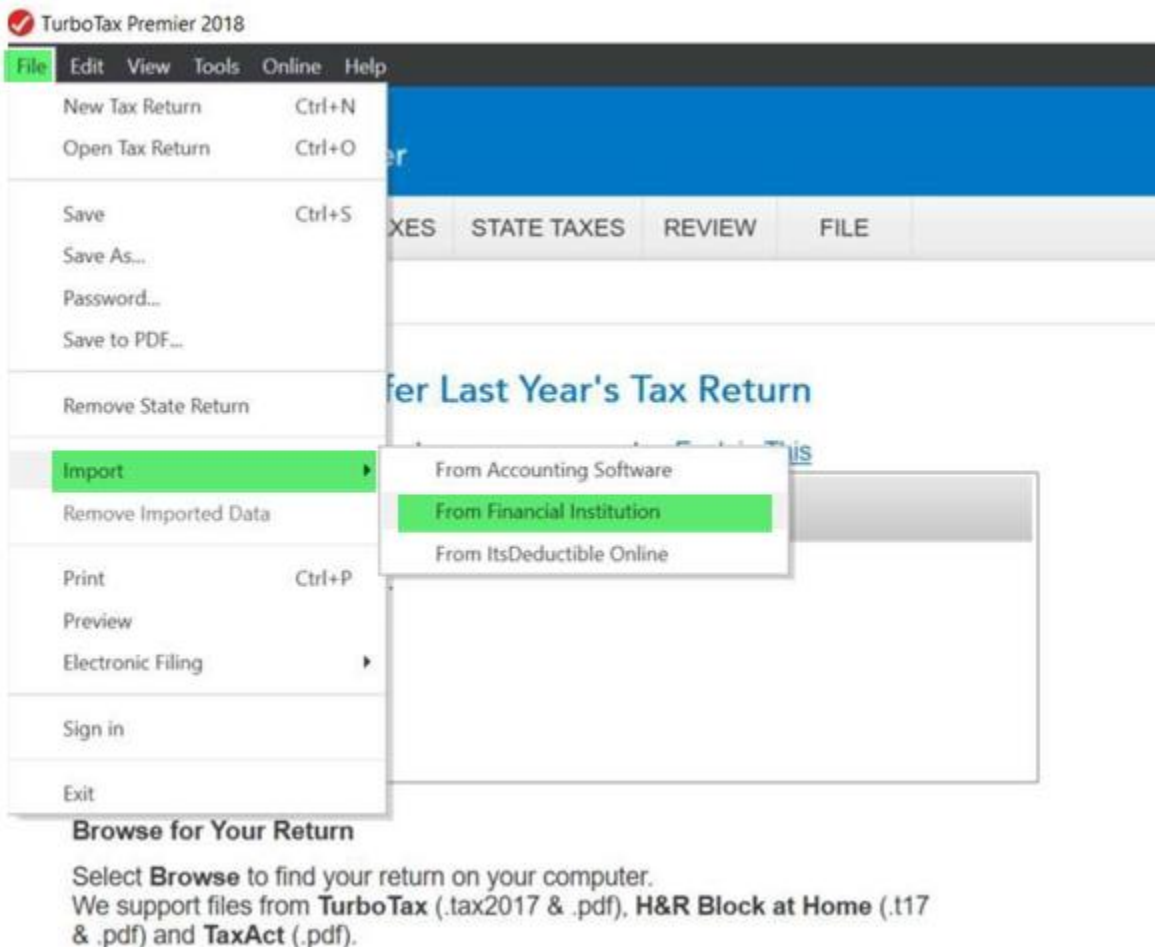


TurboTax Import Functionality



In order to help prepare you for the upcoming tax season, Apex is providing the following summary of Intuit's on-screen instructions for TurboTax.

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**.'

TurboTax Import Functionality



Let Us Enter Your Bank and Brokerage Tax Documents



We can retrieve documents like 1099-INT and 1099-DIV directly from banks and brokerages and enter them into your tax return for you. By partnering with hundreds of financial institutions, we're able to [import](#) your information so you don't have to type it in. Importing is safe, fast, and accurate.

3. **Click Continue.** Next, you will be presented with a login screen. To log in, follow these steps:

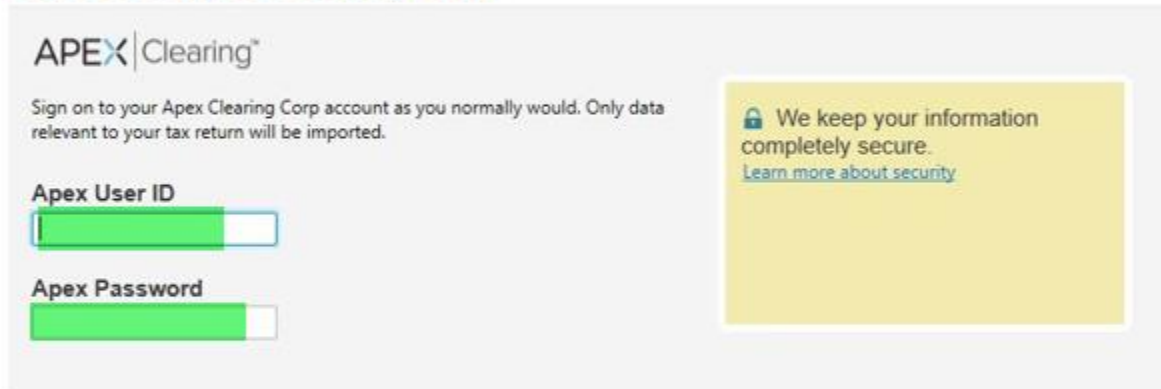
- In the **Apex User ID** field, you will need to **enter 10- and your account number**. For example, for account 5FXXXXXX enter **10-5FXXXXXX** as the Apex User ID.
- In the **Apex Password** field, you will **enter the Tax ID number (without dashes)** that is associated with the account. For most customers, this will be your Social Security Number. However, if your account is an entity account, then it may be a Tax ID number.

TurboTax Import Functionality



The screenshot shows the top navigation bar of the TurboTax Premier software. On the left is the 'intuit turbotax. Premier' logo. In the center, a 'Federal Refund' box displays '\$0'. On the right is a 'Forms' icon. Below the navigation bar are tabs for 'PERSONAL INFO', 'FEDERAL TAXES', 'STATE TAXES', 'REVIEW', and 'FILE'. A search bar on the right contains the text 'Search a topic or ask a question...'.

Sign on to Apex Clearing Corp



The screenshot shows the 'APEX Clearing™' sign-on screen. It includes the text: 'Sign on to your Apex Clearing Corp account as you normally would. Only data relevant to your tax return will be imported.' There are two input fields: 'Apex User ID' and 'Apex Password', both with green bars indicating text entry. To the right, a yellow box contains a security notice: '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.



The screenshot shows the bottom navigation bar with three buttons: 'Back' (grey), 'Skip Import' (blue), and 'Continue' (blue).

- Click **Continue**.

4. Once you select Continue and your login credentials are validated, you will be presented with a screen identifying which forms and information is available for import. **Follow the on-screen instructions to select the information you wish to include.**

Please note that the **Turbo Tax** application has **data import limitations**:

- If there are **more than 500 1099-B transactions** per return, then the customer will need to **utilize the desktop software version** which can accommodate **up to 2,200 1099-B transactions** per return.
- If the customer has **more than 2,200 transactions**, they **will not be able to use the TurboTax import function** and may have to utilize other means to file their return.