

TurboTax – Importing Tax Data from Liberty

When tax forms are available, account owners can import their tax data to TurboTax from Liberty. When account owners use the TurboTax software for their tax filing, they will be able to select Trust Company of America from a list of financial institutions from which tax data is imported. The tax payer's current Liberty login and password will be used as authentication of their identity and ability to import account tax data.

Please ensure that account owners have their login and password already established. If they need assistance logging in, account owners are provided the following email address taxhelp@trustamerica.com. TCA will then provide this information to you, the investment advisor, to further assist the account owner.

If account owners need assistance importing data from TCA into TurboTax, they are asked to contact TurboTax through the in-product Help Center, Live Community or Live Chat and Phone Support.

Note: Selecting Trust Company of America from a list of financial institutions is available on all versions of TurboTax except their free version which is available on their website.

If you have questions regarding this notice, please contact your relationship manager.