

## TurboTax and H&R Block: Importing tax data from Liberty

Account owners can import their tax information from the Liberty platform to TurboTax or H&R Block. Account owners using TurboTax or H&R Block will be able to select "E\*TRADE Advisor Services" from a list of financial institutions from which they can import their tax information. After selecting "E\*TRADE Advisor Services," account owners will need to authenticate their identity using their Liberty login and password to begin importing their tax information.

Please make sure that account owners have their user login password already established. If they need assistance logging in to Liberty, account owners can email [EAS-taxhelp@etrade.com](mailto:EAS-taxhelp@etrade.com). Your E\*TRADE Advisor Services Client Service Advocate will let you know so you can assist the account owner and explain how they can reset their password.

If account owners need assistance importing data from E\*TRADE Advisor Services to TurboTax or H&R Block, they can contact the Help Center, Live Community, or live chat and phone support for either Turbo Tax or H&R Block.

*Note: It is **not** possible to select "E\*TRADE Advisor Services" as a financial institution in the free version of TurboTax.*

If you have questions regarding this notice, please contact your Client Service Advocate.