



Putting Clients First

WarrenWealthAssociates.com

Investor360® Makes Tax Time Easier

With April 15 on the horizon, we wanted to let you know that, if you're using TaxAct, TurboTax, or H&R Block software, our Investor360® portal can save you time and aggravation by accurately transferring the investment account information you'll need to complete your federal return.

On or around January 31, 2021, our Investor360° clients who use TurboTax, TaxAct, or H&R Block software can import their tax information electronically for all of their NFS accounts. You can also receive a discount through one of these tax prep websites using the following links (the discount will automatically apply):

- **TurboTax:** Save up to \$20 at turbotax.intuit.com/affiliate/nfsdiscount.
- **H&R Block:** Save up to \$20 at www.hrblock.com/nfs.
- **TaxAct:** Save 25 percent on most of products at www.taxact.com/nfs.

Please note: Tax documents are released on a rolling basis and must be available to import.

Take a look at these helpful brochures for instructions on how to access, select, and import everything you need into TaxAct, TurboTax, or H&R Block, safely and easily. For more information and additional tax resources, select Help and then Tax Resources from within your Investor360° account.

- [TaxAct brochure](#)
- [TurboTax brochure](#)
- [H&R Block brochure](#)

We hope this makes preparing your return for 2020 just a little less stressful. As always, we encourage you to call us at 908-769-9400 with any comments or questions you may have.

And if you haven't already signed up for Investor360°, there's never been a better time to do so. Just give us a call to get started.

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