

## TurboTax and H&R Block Importing Tax Data from Liberty



Once account owners gain access to their tax forms, they can then import their tax data from the Liberty platform to TurboTax or H&R Block. Account owners using TurboTax or H&R Block will be able to select “TCA by E\*TRADE” from a list of financial institutions to import their data. In order to import their account tax data, account owners will need to authenticate their identity using their Liberty logon and password.

Please make sure that account owners have their logon and password already established. If they need assistance logging on, account owners can email [taxhelp@trustamerica.com](mailto:taxhelp@trustamerica.com). TCA by E\*TRADE 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 by E\*TRADE to TurboTax or H&R Block, they can contact the provider through the in-product Help Center, Live Community or Live Chat and Phone Support.

*Note: It is possible to select “TCA by E\*TRADE” from a list of financial institutions on all versions of TurboTax, except the free version.*

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

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