



Clients can now import their 1099 tax data into H&R Block software

You asked – and we delivered!

Effective February 16, TCA is integrated with H&R Block. That means your clients can import their TCA tax data automatically into H&R Block software to more easily and accurately complete their tax returns. This new functionality is in addition to what's been available in the past – the ability to import Intuit's TurboTax.

The importable data includes the information from Forms 1099-B, 1099-DIV, 1099-INT, 1099-OID and 1099-R. Previously, clients had to manually enter the TCA tax data into the H&R Block tax software. This took more time and introduced the potential for errors.

As investors use H&R Block software to prepare their tax returns, they can use the H&R Block import feature to access and import their TCA 1099s. Clients can simply type in Trust Company of America as their financial institution, enter their Liberty username and password when prompted, and their 1099 tax information will display. Clients will then be able to select which 1099 information they want to import.

Once imported, the H&R Block software program will automatically report the information in the appropriate sections of the client's federal income tax return.

Integrating with H&R Block is just one more way TCA strives to improve our service and efficiency for you and your clients. We are also working on developing an integration with Quicken for importing personal finance, money management and budgeting data that should be available by the second quarter of 2018.

If you have any questions about the H&R Block integration or other tax questions, please contact your TCA Relationship Manager.