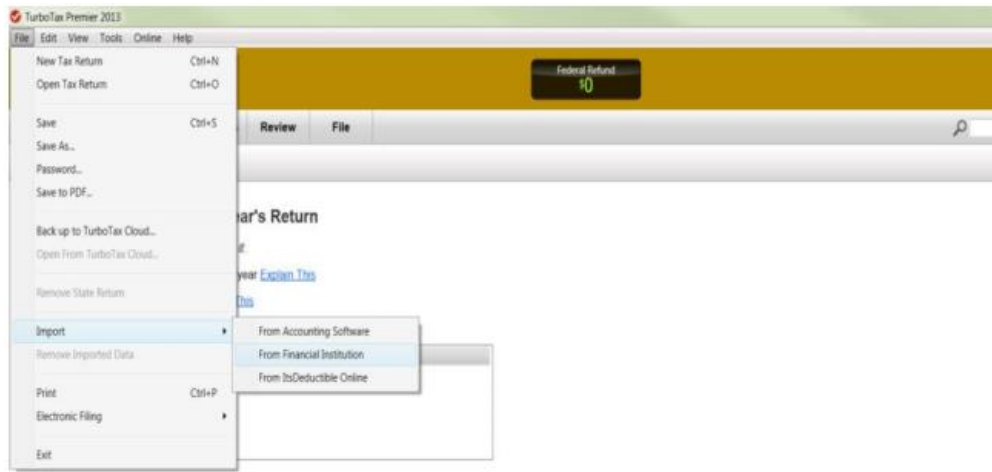


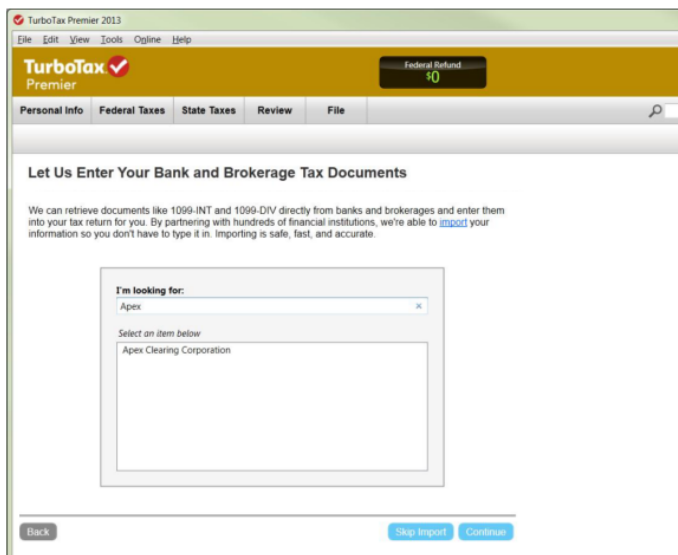
How to Import Consolidated 1099 Data into TurboTax

Please note that these instructions are using the desktop version of the TurboTax software. There may be slight deviations from the steps used in the online version.

1. After starting a New Tax Return from the **File** menu, select **Import**, then **From Financial Institution**

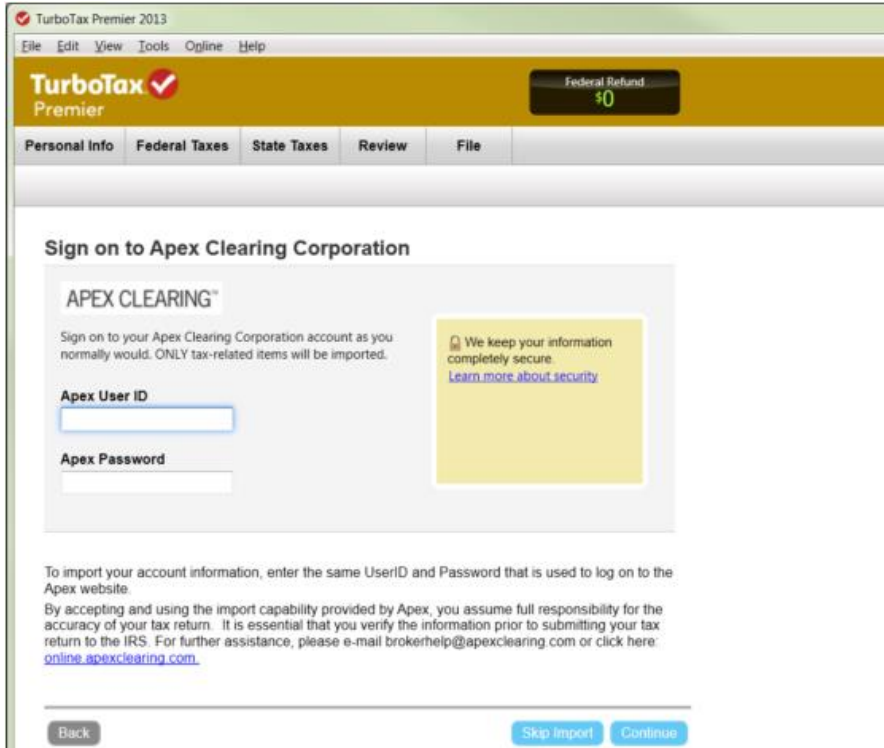


2. On the next screen enter "Apex" into the field titled "I'm looking for" and then select "Apex Clearing Corporation". **Click Continue.**



3. You will be asked to login. If you already has a login for Apex Online, then you will use those same credentials to import your Consolidated 1099 date into TurboTax. If you does not utilize Apex online, then you will need to follow these steps:

- In the **Apex User ID** field enter the number “10” plus a dash “-“then your **Firsttrade 8-digits account number**. For example, account 98812345 would be entered as 10-98812345
- In the **Apex Password** field enter the tax ID number (your social security number without slash) that is associated with the account. For most clients this will be their social security number; however, if your account is an entity account, then it may be a tax identification number.
- Click **Continue**.



TurboTax Premier 2013

File Edit View Tools Online Help

TurboTax Premier

Federal Refund \$0

Personal Info Federal Taxes State Taxes Review File

Sign on to Apex Clearing Corporation

APEX CLEARING™

Sign on to your Apex Clearing Corporation account as you normally would. ONLY tax-related items will be imported.

We keep your information completely secure.
[Learn more about security](#)

Apex User ID

Apex Password

To import your account information, enter the same UserID and Password that is used to log on to the Apex website.

By accepting and using the import capability provided by Apex, you assume full responsibility for the accuracy of your tax return. It is essential that you verify the information prior to submitting your tax return to the IRS. For further assistance, please e-mail brokerhelp@apexclearing.com or click here: online.apexclearing.com.

Back Skip Import Continue

Once logged in, you will be presented with a screen identifying what forms and information is available for import. You simply need to follow the on-screen instructions to select the information you wish to import.

If you have any questions, please contact our customer service at 1-800-869-8800, send email to service@firsttrade.com, or Live Chat us.