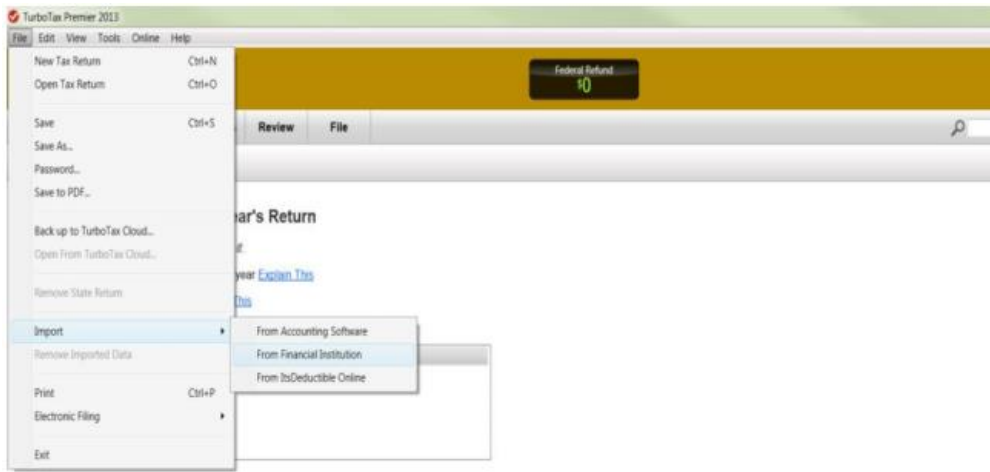


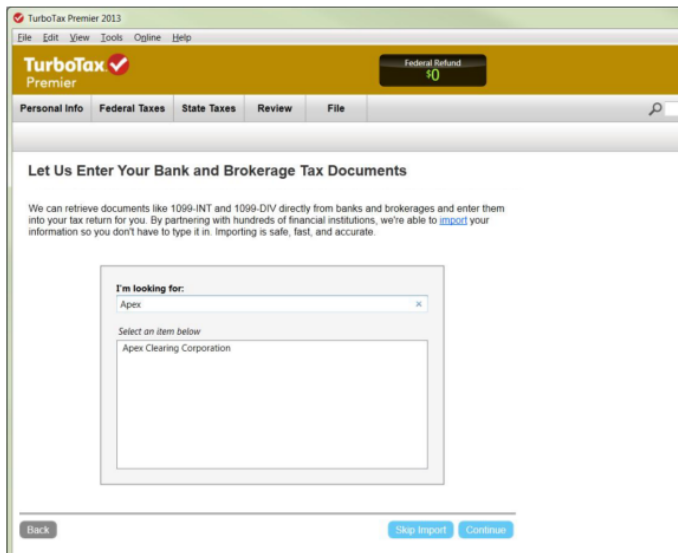
How to Import Consolidated 1099 Data into TurboTax

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.

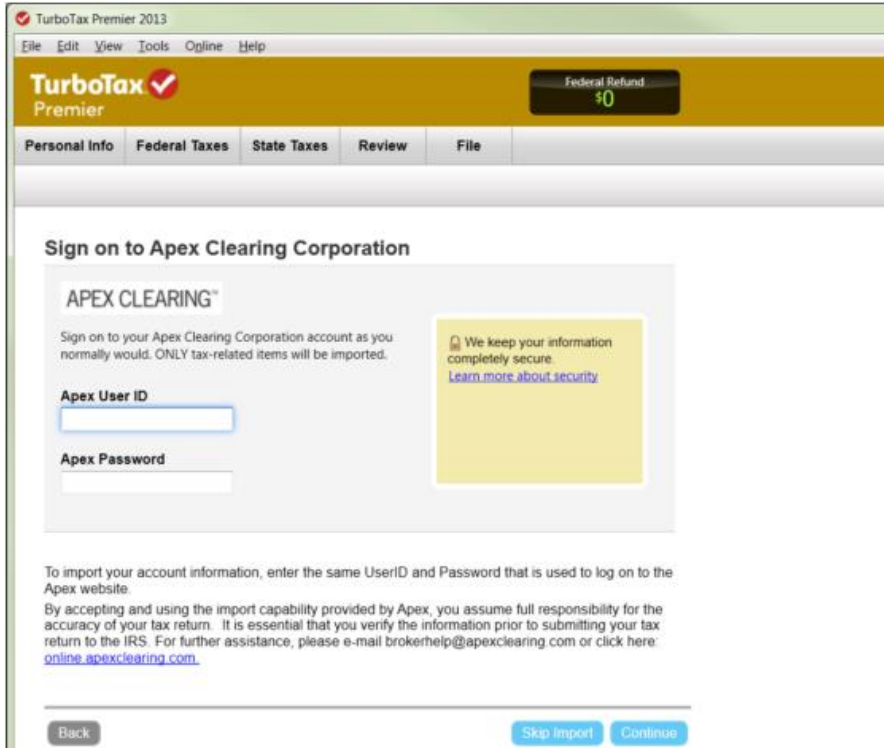
1. After starting a New Tax Return from the **File** menu, select **Import**, then **From Financial Institution**



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



3. Follow the instructions below and sign on to your account:
 - In the **Apex User ID** field, enter your **Firsttrade 8-digits account number**.
 - 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**.



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.