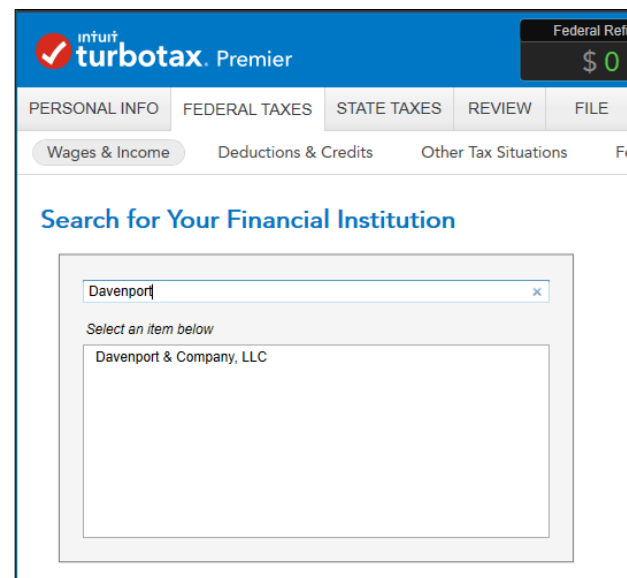


TurboTax® Instructions for Tax Preparation

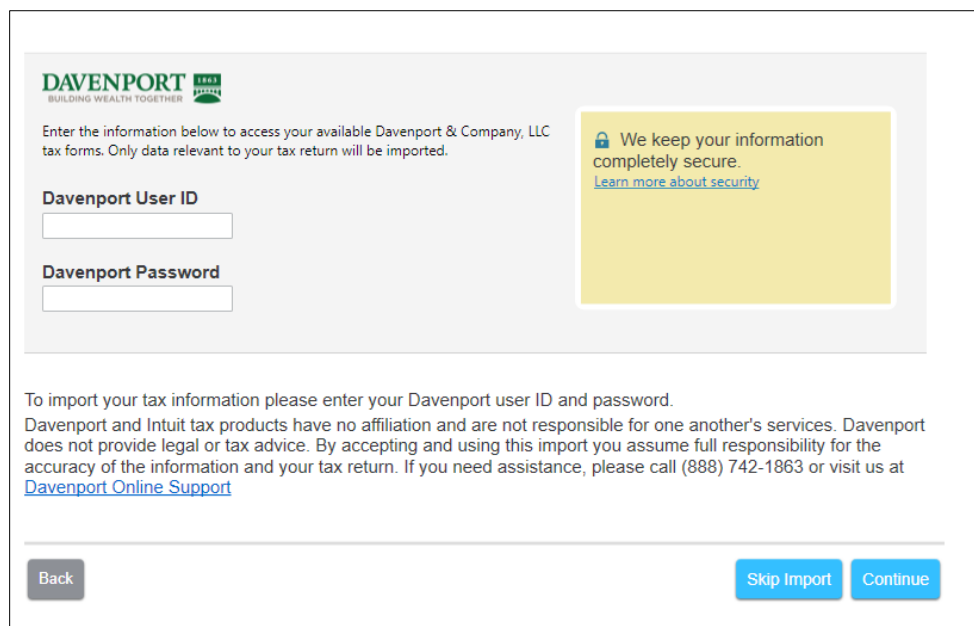
Data will be available to import starting on January 31 and will follow the mailing schedule of tax forms ([available here](#)).



The screenshot shows the TurboTax Premier interface. At the top, there is a blue header with the Intuit TurboTax Premier logo and a 'Federal Refund' status showing '\$0'. Below the header are navigation tabs: PERSONAL INFO, FEDERAL TAXES, STATE TAXES, REVIEW, and FILE. Under these tabs are sub-tabs: Wages & Income, Deductions & Credits, Other Tax Situations, and Federal. The main content area is titled 'Search for Your Financial Institution'. It features a search input field containing the text 'Davenport'. Below the input field, it says 'Select an item below' and lists 'Davenport & Company, LLC' as a search result.

Documents will be imported using your Davenport user ID and password used to log on to Davenport Online.

If you need assistance, please call (888) 742-1863 or visit www.investdavenport.com/taxprep.



The screenshot shows the Davenport login page for tax import. At the top left is the Davenport logo with the tagline 'BUILDING WEALTH TOGETHER'. Below the logo, it says 'Enter the information below to access your available Davenport & Company, LLC tax forms. Only data relevant to your tax return will be imported.' There are two input fields: 'Davenport User ID' and 'Davenport Password'. To the right of the input fields is a yellow box with a lock icon and the text 'We keep your information completely secure. [Learn more about security](#)'. Below the input fields, there is a paragraph of text: 'To import your tax information please enter your Davenport user ID and password. Davenport and Intuit tax products have no affiliation and are not responsible for one another's services. Davenport does not provide legal or tax advice. By accepting and using this import you assume full responsibility for the accuracy of the information and your tax return. If you need assistance, please call (888) 742-1863 or visit us at [Davenport Online Support](#)'. At the bottom, there are three buttons: 'Back', 'Skip Import', and 'Continue'.