

TurboTax® Importing

It is important to understand that the tax information imported from NMIS Online to your TurboTax return may not include all of the information required for you to properly complete the investment income portion of your federal and/or state tax returns. **It is essential that you complete the TurboTax Interview and/or Review processes in their entirety to ensure that all NMIS Online information is correctly reported to the IRS and/or the state(s) to which you report.**

Be sure to verify the information that you import with your own records in order to ensure accurate and complete reporting of all required tax information on your federal and/or state tax return(s). Although NMIS is providing the tax information import as an additional service, NMIS does not guarantee that the information provided is sufficient for tax reporting purposes, and NMIS is not liable for your reliance upon or use of the import feature or the data provided through such feature. If you have specific questions regarding the preparation of your tax return, contact your tax advisor, the IRS or the state(s) to which you report.

If you choose to import your investment information from NMIS, please follow the directions below. **This is a guide to assist only with the Import Your Tax Info in the Income portion of TurboTax. You will be presented with these screens once you have entered all of your tax information as well as your personal information. If you have trouble with other sections of TurboTax, please contact TurboTax/Intuit directly.**

The screenshot shows the TurboTax Deluxe 2012 interface. The top navigation bar includes 'Personal Info', 'Federal Taxes', 'State Taxes', 'Review', and 'File'. The 'Federal Taxes' and 'Wages & Income' menu items are circled in red. The main content area is titled 'Let Us Enter Your 1099-INT' and features logos for various financial institutions like Fidelity, Morgan Stanley, Ameritrade, Vanguard, Scottrade, USAA, Merrill Lynch, and Charles Schwab. Below the logos, there is a section for 'How do you want to enter your 1099-INT into your return?' with the 'Import from my bank or brokerage' option selected. A search field contains 'NMIS, LLC' and a dropdown menu shows 'NMIS, LLC' as a selection. The 'Continue' button is circled in red. The bottom status bar shows 'No Form' and '100%' zoom.

Choose **NMIS, LLC** from the financial institution list on the “Let Us Enter Your 1099-INT” screen.

TurboTax Deluxe 2012

File Edit View Tools Online Help

TurboTax Deluxe

Federal Refund \$0

Forms Print Center Help Center

Personal Info Federal Taxes State Taxes Review File

Wages & Income Deductions & Credits Other Tax Situations Federal Review Error Check

Sign on to NMIS, LLC

Northwestern Mutual Investment Services LLC

Sign on to your NMIS, LLC account as you normally would. ONLY tax-related items will be imported.

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

User ID

Password

NMIS, LLC and TurboTax have no affiliation and are not responsible for one another's services. NMIS, LLC 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.

To import your tax information, enter your user id and password that you use to log on to your NMIS Online Internet account. If you need assistance, call Northwestern Mutual Investor Services (Monday through Friday, 7:30 AM - 5:00 PM CT) at 1-866-664-7737, Option 3 or [visit us on the web](#).

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Flags

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No Form 100%

Use your **Northwestern Mutual ID and password** and click **Continue** to download your information. Follow the instructions listed on the screen if you have trouble.