

Scivantage Investor Scivantage Data eXchange for TurboTax®



Leverage Scivantage's Data eXchange and Make Tax Preparation Quick and Easy For Your Customers

Keeping pace with the recordkeeping demands of the Internal Revenue Service, while staying current with ever-changing tax regulations has never been more challenging for investors. Utilizing Scivantage's Data Exchange (SDX) for TurboTax®, financial institutions can now enable their customers to seamlessly download all of their critical financial information into TurboTax®; helping to reduce their overall tax preparation burden. With direct electronic download support for TurboTax® Instant Data Entry (IDE), firms can provide their customers with download access to investment data needed to complete official tax forms such as the IRS 1099 and Schedule D. Through this automated service, data is distributed and automatically entered on the correct tax forms with just a few, simple clicks—saving time and virtually eliminating data entry errors.



Through our relationship with Intuit, SDX for TurboTax® enables financial institutions to actively participate in the TurboTax® 1099 download program. This unique service delivers a customized presence in both the TurboTax® desktop and TurboTax® OnlineSM programs, providing a one-stop location for customers to download account and transaction data directly to their income tax preparation software. A dedicated TurboTax® processing environment is deployed to enable 24 hour-per-day, 7 day-per-week download and importing capabilities through a secured environment.

Benefits of SDX for TurboTax®

- Attract, retain and empower clients to take control of the tax preparation process
- Automate tax form development and enhance online tax services
- Increase data accuracy and cut call center inquiries during tax season
- Reduce the recordkeeping burden on customers and help to reduce tax preparation time
- Deliver 24/7 access to critical financial information throughout tax season—system optimized to handle heavy requests during peak times
- Available as an integrated component of Scivantage Investor or can be deployed within a firm's proprietary systems



Customizable application provides investors with access to critical financial information needed to complete official tax forms

Offer Convenient and Accurate Download of All 1099 Data into TurboTax®

As part of the SDX for TurboTax® download service, Scivantage makes certain that the investment information provided is up-to-date and conforms to the latest guidelines of the IRS 1099 tax forms. In addition, data matching capabilities ensure consistency between electronic downloads and official tax forms which may be sent to clients through the mail.

Scivantage's Data Exchange automates the import of all 1099 data to reduce tax preparation time. The data service supports all 1099 forms available within the TurboTax® download program, including:

- Form 1099-B (Proceeds from Broker and Barter Exchange)
- Form 1099-DIV (Dividend Income)
- Form 1099-INT (Interest Income)
- Form 1099- MISC (Miscellaneous Income)
- Form 1099-OID (Original Issue Discount)
- Form 1099-R (Retirement Plan Distributions)

This is important tax information and is being furnished to the Internal Revenue Service. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.

Copy B for Recipient

Department of the Treasury-Internal Revenue Service

RECIPIENT'S identification number	123-45-6789
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(Keep for your Records)

Corrected (if checked) (OMB No. 1545-0715)

FORM 1099-B • PROCEEDS FROM BROKER & BARTER EXCHANGE TRANSACTIONS • 2007

(1a) Date of sale or exchange	(2) Gross proceeds from stocks, bonds, etc.*	(4) Federal income tax withheld	(7) Description		
		Transaction		Share price	Shares this transaction
Fund: DREYFUS GROWTH AND INCOME FUND, INC.	0010-5055555555	PAYER'S Fed. ID: 60-7654321	TRANSACTION 1	CUSIP NO: (1b) 8AF109310	

Scivantage Data eXchange (SDX)

Scivantage's Data eXchange provides financial institutions with direct access to timely, accurate and complete client, account and transaction data via proprietary data services and adaptors. Unique middleware technology allows for the real-time processing and routing of critical financial information, including:

- Real-time or batched processing and storage of client, account and transaction information
- Direct integration adaptors to all major back office providers, content and market data vendors, account aggregation services and statement providers
- Support for various personal money management and tax preparation download services, including TurboTax®, TaxCut®, Quicken® and Microsoft® Money®

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