



# **Import TXF into TurboTax**

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**11/30/2008**

## Overview

This document describes the step-by-step instructions for importing TXF files into TurboTax Premier 2007. A total of 10 screen snapshots are provided to guide a user through the entire import process.

If your online broker does not provide downloadable TXF files, you can visit TXF Express's website <http://www.txf-express.com/> to convert your broker-specific trade data into the standard TXF format online in just less than 30 seconds. The price for online TXF generation starts at only \$2.99.

If you feel hesitant to generate TXF files online, you can buy and download software **TXF Creator** from <http://www.txf-express.com/software> to create TXF files locally. The price of **TXF Creator** is as low as \$4.99.

If you have any questions or comments regarding TXF Express products or services, please feel free to contact us at [support@txf-express.com](mailto:support@txf-express.com).

## Step 1:

Go to **Federal Taxes** and choose **Income**.  
Click on button **Select Specific Topics**.

The screenshot shows the TurboTax Premier 2007 software interface. The window title is "2007 Tax Return.tax - TurboTax Premier 2007". The menu bar includes File, Edit, View, Forms, EasyStep, Tools, Online, Window, and Help. The main navigation bar has tabs for Personal Info, Federal Taxes (selected), Federal Review, State Taxes, and Print & File. Below this, there are sub-tabs for Income (selected), Deductions & Credits, and Other. A "Federal Refund" box shows "\$0". A search bar contains "Search Topics or Forms", and there are links for "Topic List" and "Help".

### Your Income

There are two ways you can work on your income, based on which style is right for you. No matter which option you choose, rest assured we'll guide you every step of the way.

**Select Specific Topics**

- Already know what income you need to enter
- Want to quickly find or return to an income topic

**Guide Me Through Income**

- Want step-by-step guidance through all types of income
- Need help figuring out where your income goes

Buttons for "Select Specific Topics" and "Guide Me Through Income" are visible at the bottom of the page.

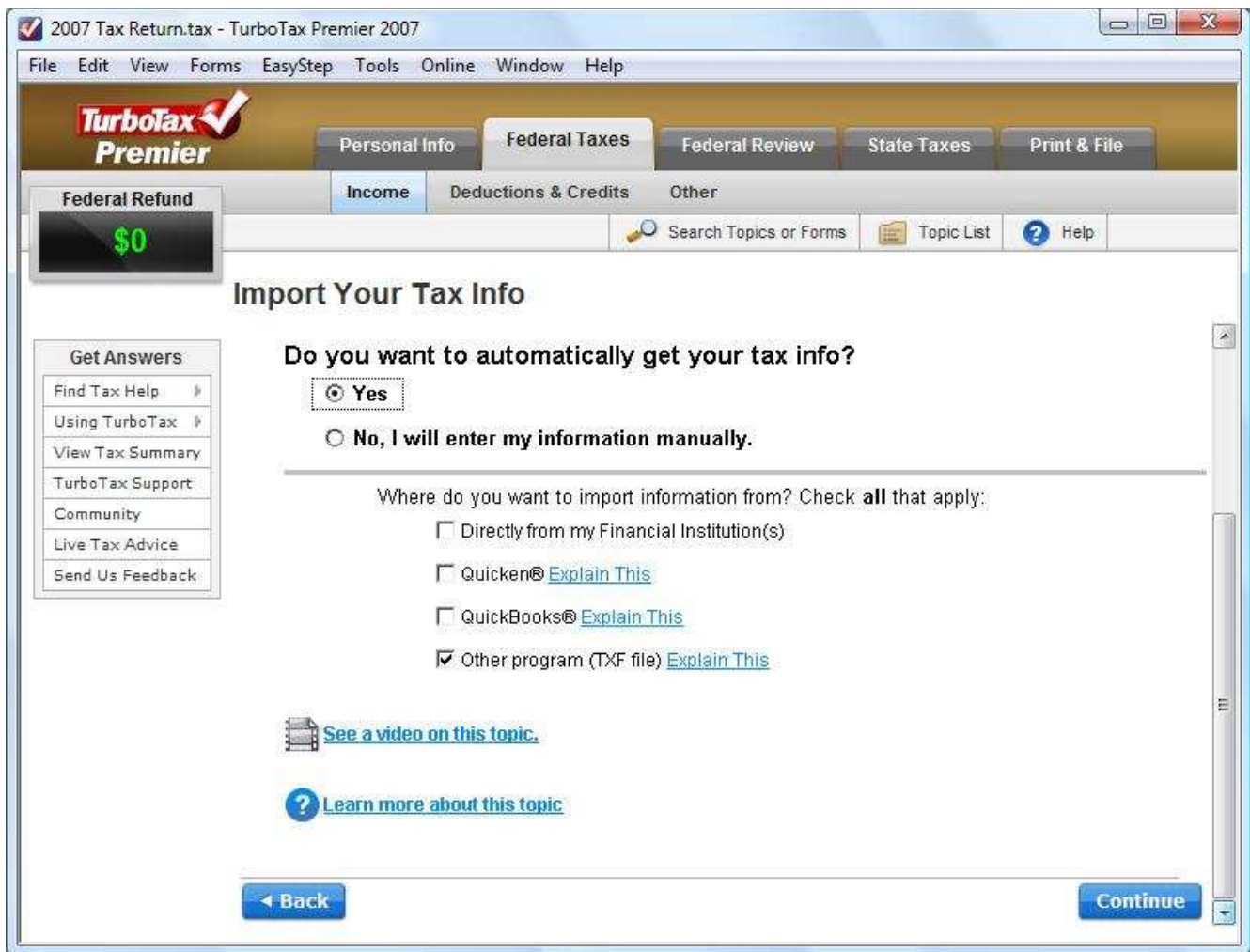
## Step 2:

Choose **Import Your Tax Info** from the list of topics.  
Click on button **Revisit**.

The screenshot shows the TurboTax Premier 2007 software interface. The window title is "2007 Tax Return.tax - TurboTax Premier 2007". The menu bar includes File, Edit, View, Forms, EasyStep, Tools, Online, Window, and Help. The main navigation tabs are Personal Info, Federal Taxes, Federal Review, State Taxes, and Print & File. Under Federal Taxes, there are sub-tabs for Income, Deductions & Credits, and Other. A "Federal Refund" box shows "\$0". A search bar contains "Search Topics or Forms" and "Topic List" buttons. The "Your Income" section is active, displaying a list of income categories: "Wages and Salaries" (Form W-2) with a "View List" button; "Import Your Tax Info" (Get your info from your financial institution(s) or software) with a "Close List" button, a "2007 Amount" field, and a "Revisit" button; and "Interest and Dividends" (Forms 1099-INT, 1099-DIV, 1099-OID) with a "View List" button. A "Get Answers" sidebar on the left lists options like "Find Tax Help", "Using TurboTax", "View Tax Summary", "TurboTax Support", "Community", "Live Tax Advice", and "Send Us Feedback".

### Step 3:

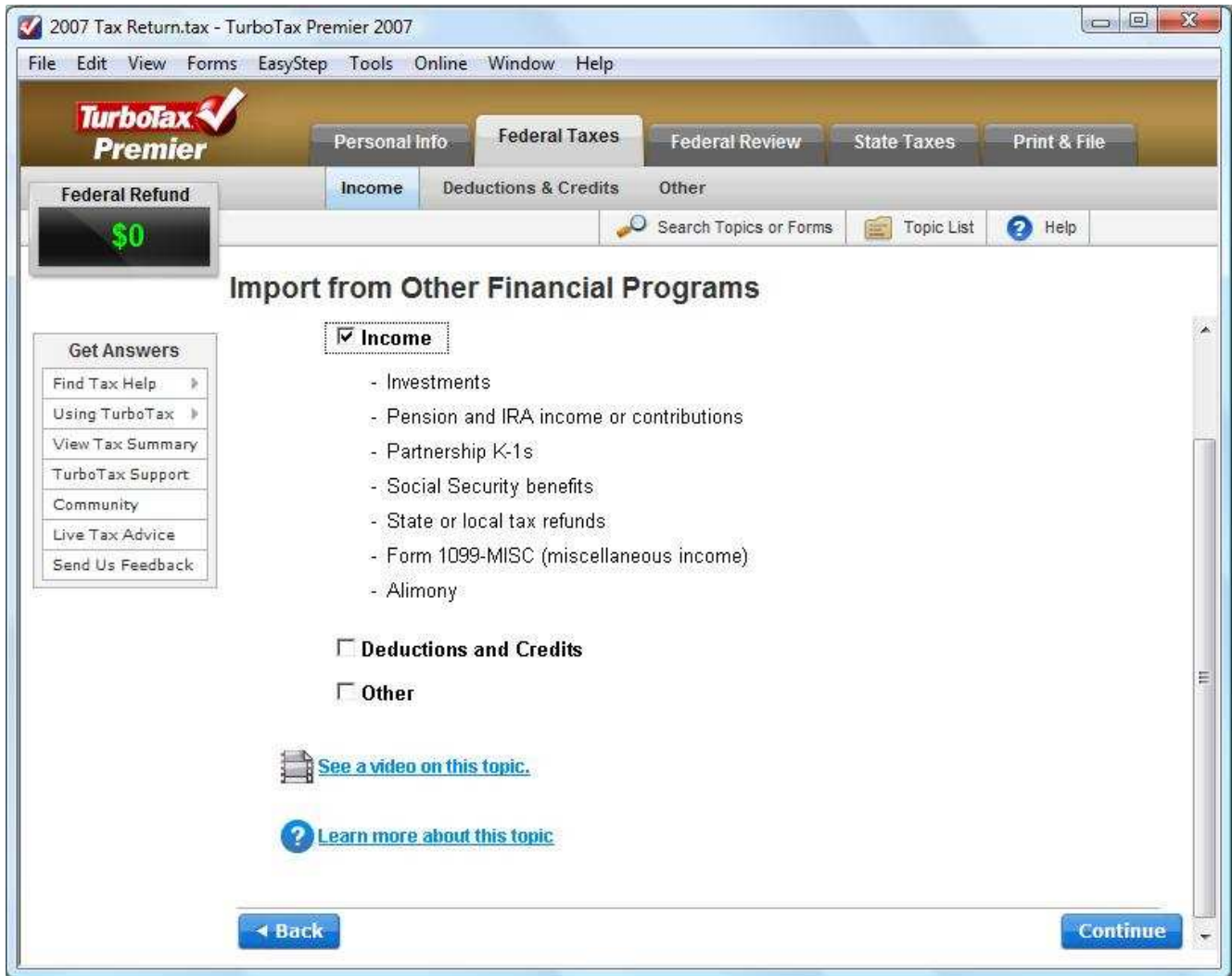
Answer **Yes** to question "Do you want to automatically get tax info?".  
Select **Other program (TXF file)**.  
Click on button **Continue**.



## Step 4:

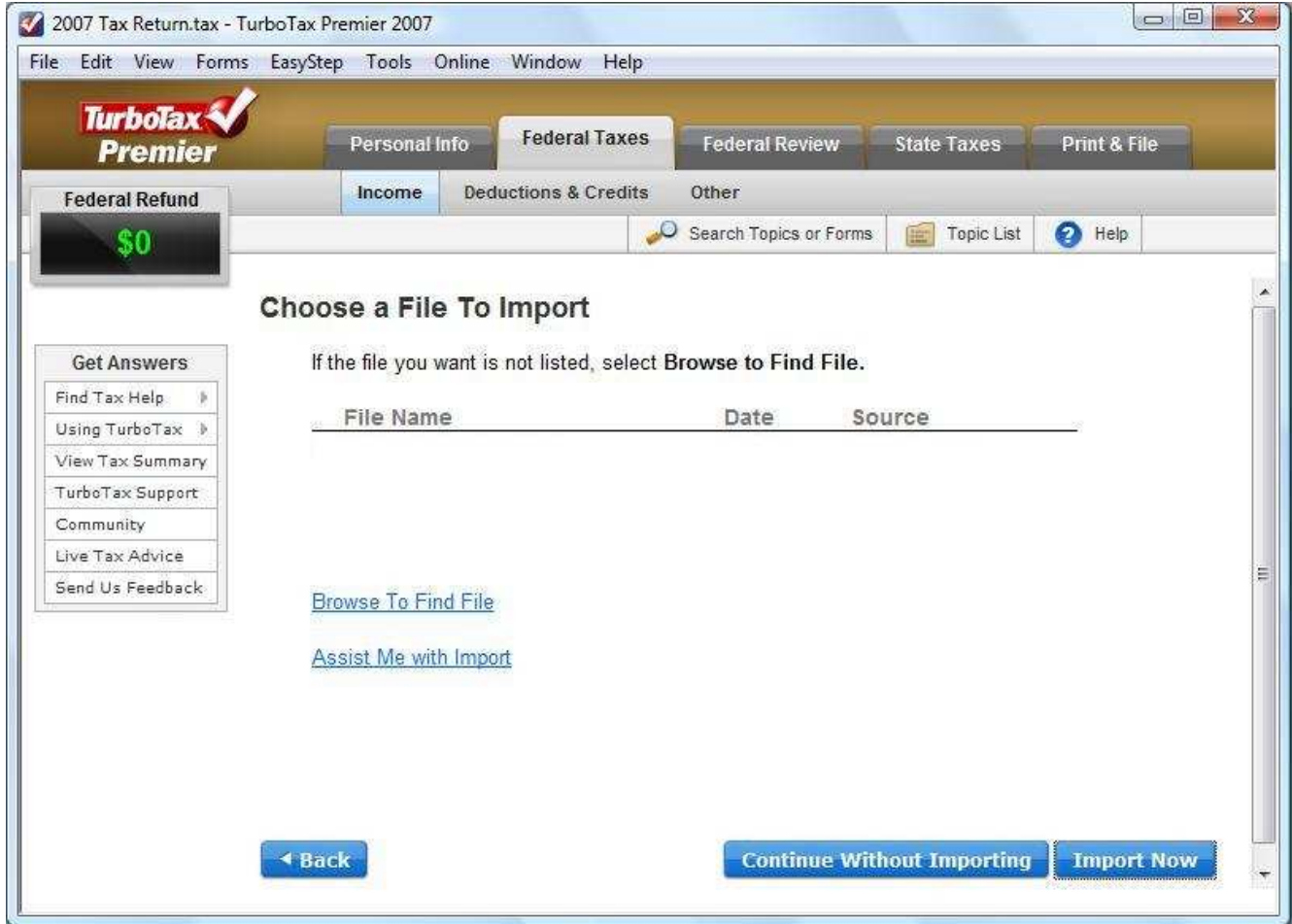
Select **Income**.

Click on button **Continue**.



## Step 5:

Click link **Browse to Find File**.

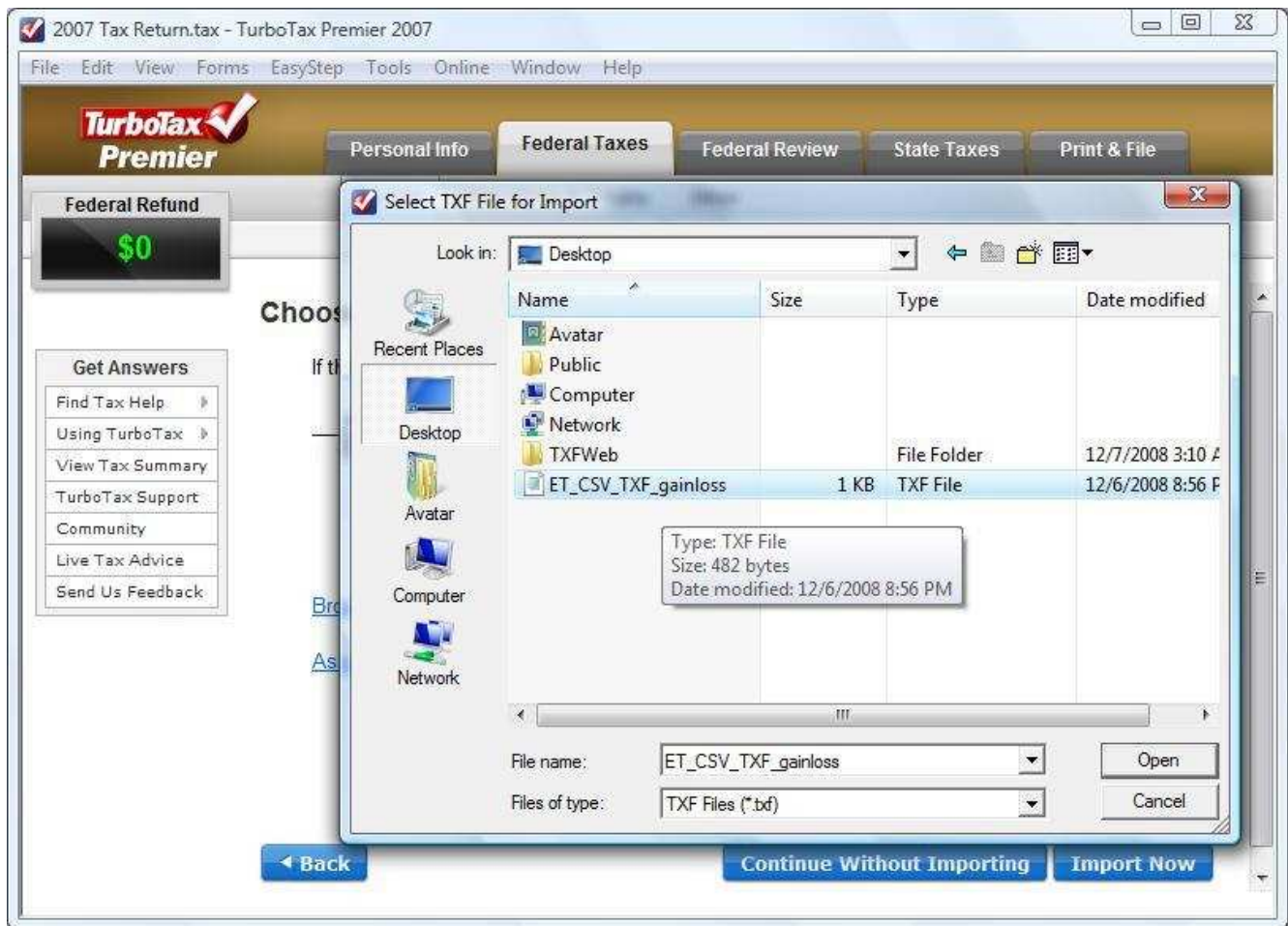




## Step 6:

Browse your file directories to find the TXF file for import into TurboTax. The screen snapshot below shows an example file ET\_CSV\_TXF\_gainloss.txf.

Select your TXF file and click on button **Open**.





## Step 7:

Select the loaded TXF file ET\_CSV\_TXF\_gainloss.  
Click on button **Import Now**.

2007 Tax Return.tax - TurboTax Premier 2007

File Edit View Forms EasyStep Tools Online Window Help

**TurboTax Premier**

Personal Info **Federal Taxes** Federal Review State Taxes Print & File

Federal Refund **\$0**

Income Deductions & Credits Other

Search Topics or Forms Topic List Help

### Choose a File To Import

If the file you want is not listed, select **Browse to Find File**.

File Name	Date	Source
<input checked="" type="radio"/> ET_CSV_TXF_gainloss	12/06/08	Realized Gains and Losses 2007

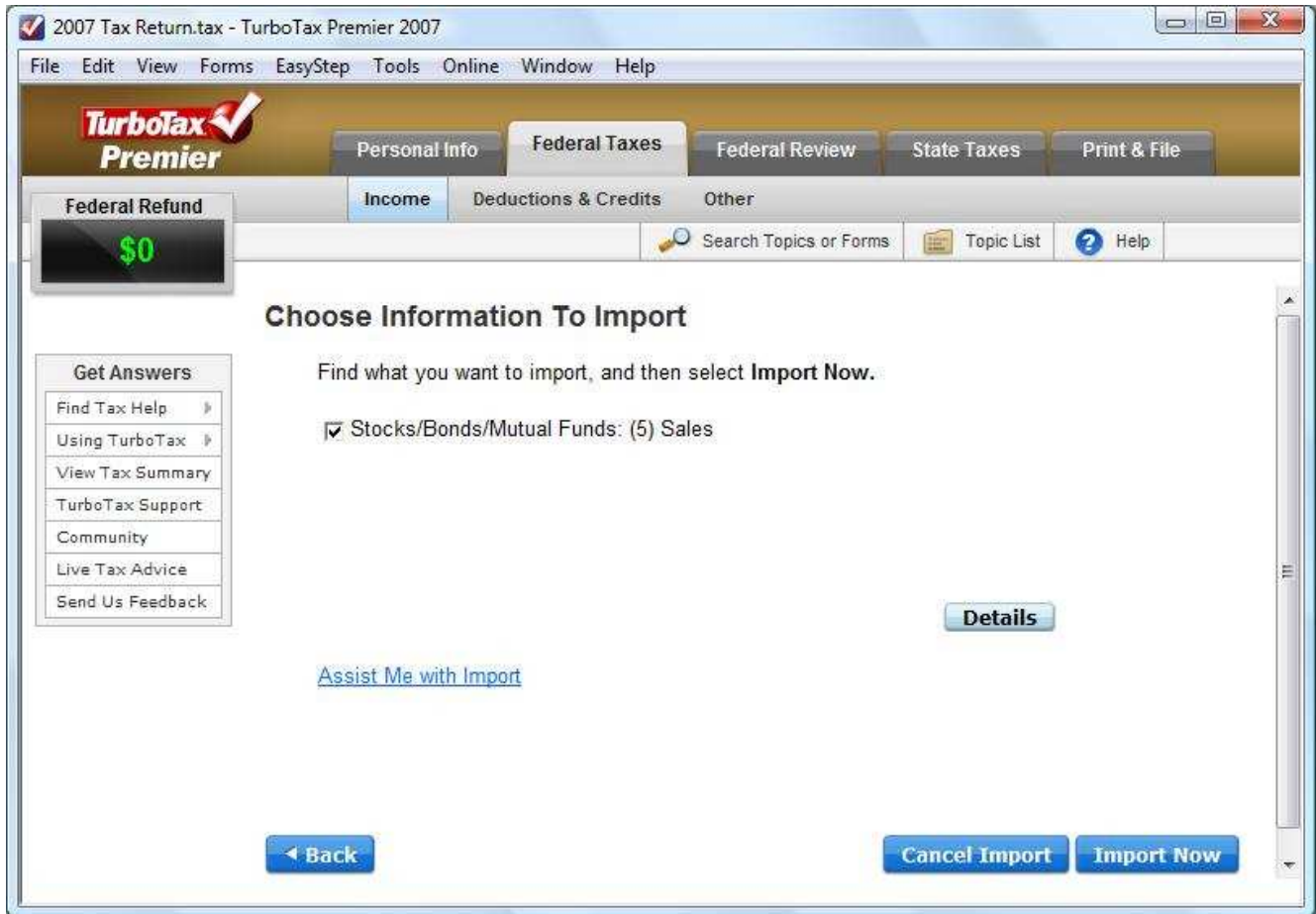
[Browse To Find File](#)

[Assist Me with Import](#)

[Back](#) [Continue Without Importing](#) [Import Now](#)

## Step 8:

After the TXF file is imported, you can see a brief summary like the following. Click on button **Details** to examine the detailed information.



## Step 9:

A dialog pops up, that shows information on individual matches between buy and sell. You can verify the information by dragging down the vertical scroll bar. After you are done, close the dialog.

Click on button **Import Now**.

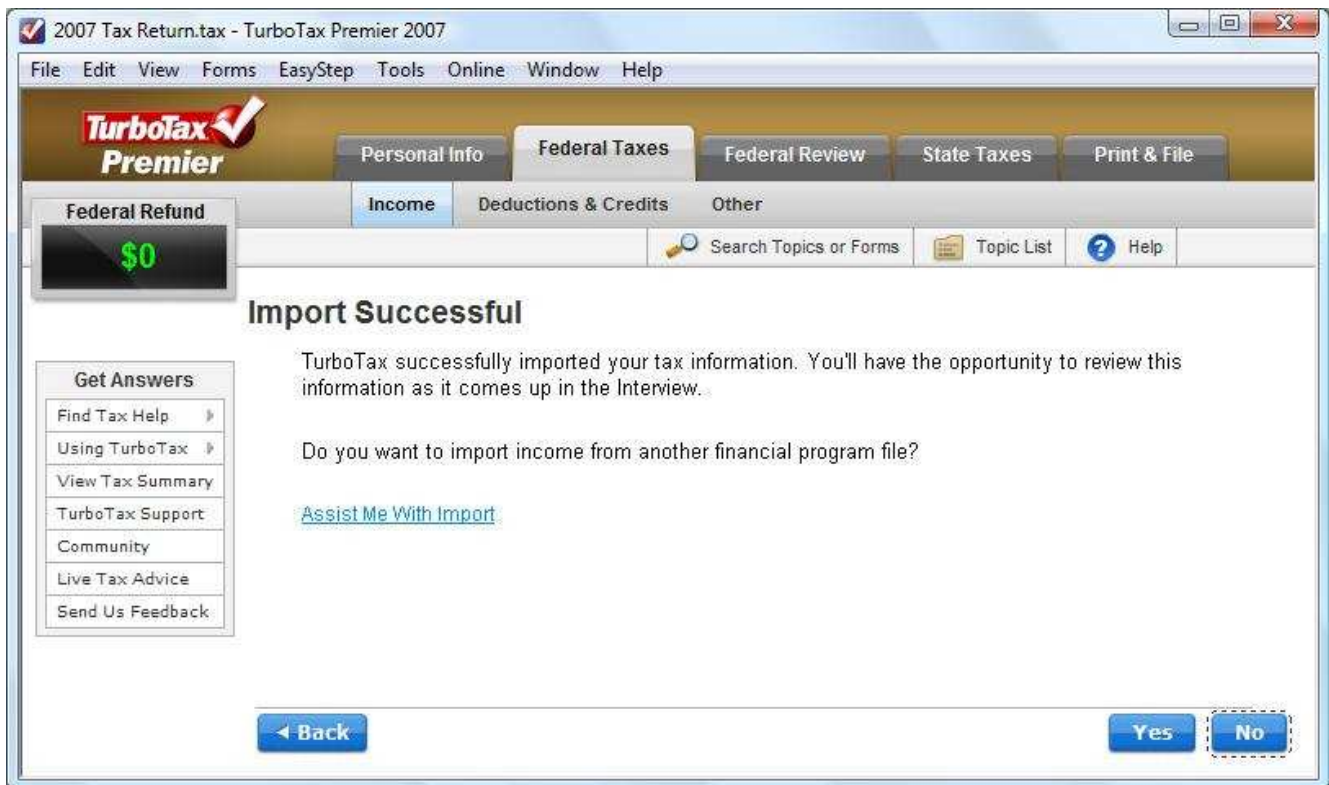


## Step 10:

After you have done all the steps above, you will see a message like the following:

### **Import Successful**

TurboTax successfully imported your tax information.



## Congratulations

You have successfully imported your TXF file.