

# How do I decide how much historical data to add?

Answer the questions below as accurately as you can to decide which setup method suits your situation.

## Do you want to track performance measures and get tax planning assistance?

Performance measures	Tax planning
Your <a href="#">investment performance reports</a> are complete and accurate. You can also analyze your holdings, balance your asset allocation, and monitor your portfolio's performance.	Your <a href="#">investment-related tax reports</a> are complete and accurate. When you sell a security, the Capital Gains report includes information to help you prepare Schedule D. You can also reduce your tax liability before you sell by trying out different sales scenarios in the Capital Gains Estimator. You can even import investment-related tax information directly into TurboTax.
If you want complete performance measures and tax tracking assistance, <a href="#">enter all historical/missing transactions</a> .	

## Do you want tax planning assistance to include securities that you've sold?

Have you sold securities during the current or previous tax year, and would you like help preparing [investment-related tax reports](#) to track capital gains and other information for Schedule D? If so, [enter all historical/missing transactions](#).

## Do you have access to all historical transaction information?

Can you locate all past statements for this account? And are you willing to enter all the missing transactions? If so, you should [enter all historical/missing transactions](#). Otherwise, you can [estimate the average cost](#) or you can leave the placeholder entries as they are for now. Consider choosing entering holdings with adjusted cost basis if both of the following are true:

- This account is very active or you've held it for several years, and
- Your brokerage reports adjusted cost basis on either your monthly statement or a website