Quicken® for Mac Personal Finance Software 2005–2007
Bank Account Conversion Instructions

A. BACK UP YOUR CURRENT DATA

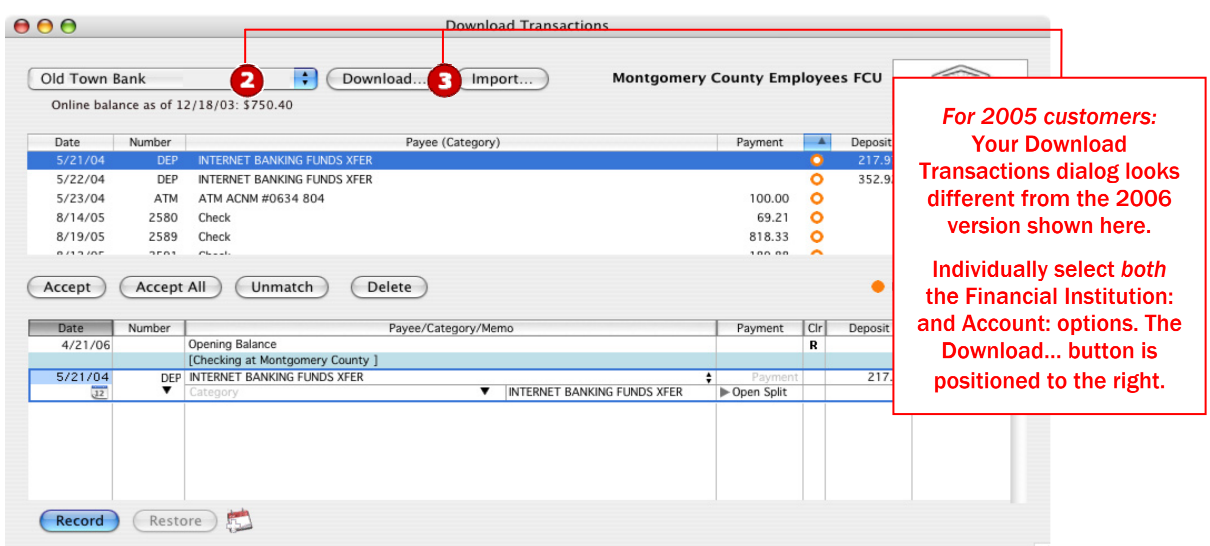
1. *Quicken for Mac 2006 customers:* Choose **File** menu → **Back Up** → **To Disk…**.
   Quicken for Mac 2005 customers: Choose **File** menu → **Save a Copy…**.
2. Complete the following prompts.

B. DOWNLOAD THE LATEST QUICKEN UPDATE

1. *Quicken for Mac 2006 customers:* Choose **Quicken 2006** menu → **Check for Updates**.
   Quicken for Mac 2005 customers: Choose **Quicken 2005** menu → **Check for Updates**.
2. If a software update is available, then you will be prompted to download the update from the Quicken Web site.
3. Once the update is complete, restart Quicken.

C. GET YOUR LATEST TRANSACTIONS FROM YOUR BANK

1. Choose **Online** menu → **Download Transactions…**.



2. *Quicken for Mac 2006 customers:* Click to select your account from the drop-down list.
   Quicken for Mac 2005 customers: Click to select your financial institution and account from the drop-down lists. (The note in the graphic explains how your **Download Transactions** dialog will look a little different.)

3. Click **Download...**.

4. Enter your customer ID and PIN to log in to your bank's Web site. Download your transactions through July 27, 2009 into Quicken.

Note: You will not be able to download these transactions after July 24, 2009.

Repeat steps **2** through **4** for each account (such as checking, savings, credit cards, and brokerage) that you will use for online banking and investing.

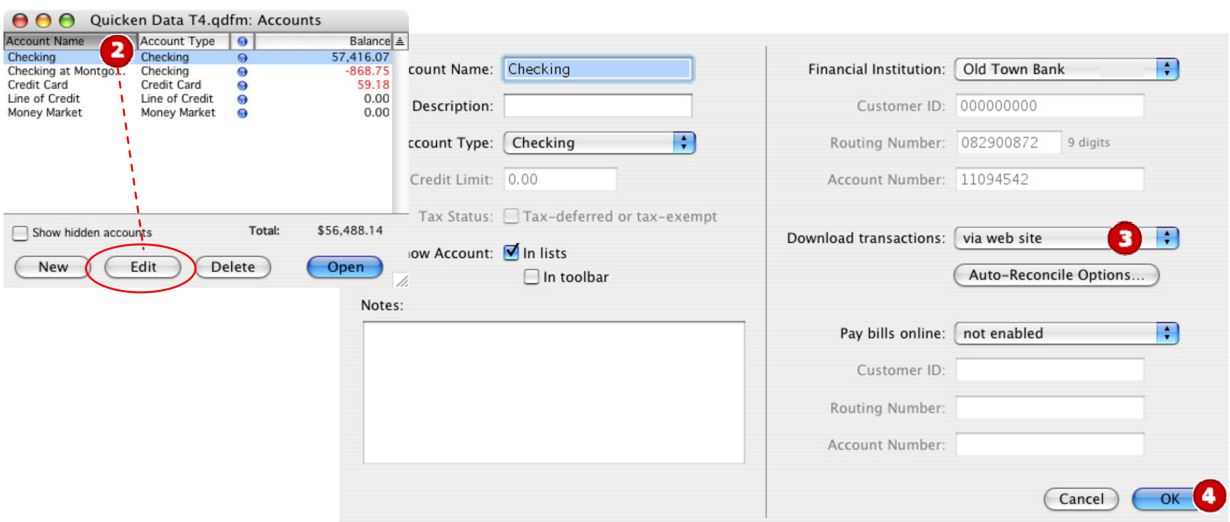
5. Once the transactions are downloaded, **accept all the transactions into your Quicken account register**.

Important: You will not be able to proceed to the next section until you accept all transactions in the **Download Transactions** tab.

⚠ For help reconciling your account register, choose **Help** menu → **Quicken 2006 Help** (or **Quicken 2005 Help** depending upon version). In the **Ask a Question** prompt, enter *Reconciling an account*.

D. DISABLE YOUR ACCOUNTS WITH YOUR BANK

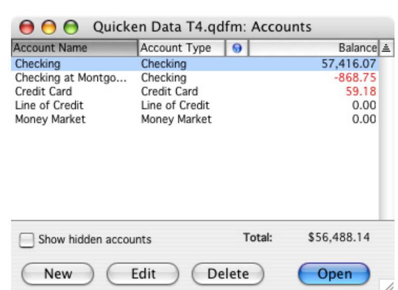
1. Choose **Lists** menu → **Accounts**.



2. Select the account you want to disable, and click **Edit**. **Edit account number, etc. as needed**.

3. In the **Download transactions:** drop-down list, select **not enabled**. Click **OK** to the prompt, "You are about to disable…"

4. Click **OK** to save your edits.



Repeat steps **2** through **4** for each online account (such as checking, savings, credit cards, and brokerage). As each online account is disabled, its blue online circle icon disappears. Verify that your account list does not display blue online circle icons for any accounts at your bank.

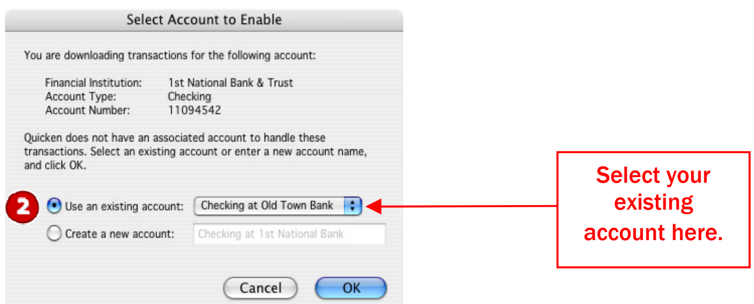
E. ENABLE YOUR ACCOUNTS WITH YOUR BANK

IMPORTANT: Complete section **E** *on or after* July 27, 2009.

1. Anytime on or after July 27, 2009, log in to your bank's Web site. Download your transactions into Quicken.

Important: To avoid the possibility of creating duplicate records when downloading into Quicken, select a "from" date that does not include records previously downloaded from your bank.

2. Click the **Use an existing Quicken account** radio button**.** In the corresponding drop-down list, select the Quicken account that you used for your bank.



Repeat steps **1** and **2** for each account that you will use for online banking or investing with your bank.

THANK YOU FOR MAKING THESE IMPORTANT CHANGES!

For assistance, please refer to: http://www.intuit.com/support/quicken.