

Quicken® Personal Finance Software 2006 for Windows® Bank Account Conversion Instructions

A.

BACK UP YOUR CURRENT DATA

1. Choose **File** menu → **Backup**.
2. Specify which file to back up and where you want the backup saved in the **Quicken Backup** dialog, and then click **OK**.

B.

DOWNLOAD THE LATEST QUICKEN UPDATE

1. Choose **Online** menu → **One Step Update**.
2. In the **One Step Update** dialog, click **Update Now**.
3. If a software update is available, then you will be prompted to apply it now.
4. Once the update is complete, restart Quicken.

C.

GET YOUR LATEST TRANSACTIONS FROM YOUR BANK



1. 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 this step for each account (such as checking, savings, credit cards, and brokerage) that you use for online banking or investing.

2. 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 **Downloaded Transactions** tab.

- ▲ For help accepting transactions, choose **Help** menu → **Quicken Help**. In the **Type in the word(s) to search for:** prompt, enter **Accept downloaded transactions into my transaction list**.
- ▲ For assistance reconciling your account register, choose **Help** menu → **Quicken Help**. In the **Type in the word(s) to search for:** prompt, enter **Reconciling an account**.

Note: In version 2004, choose **Help** menu → **Contents**. Click the **Search** tab.

D.

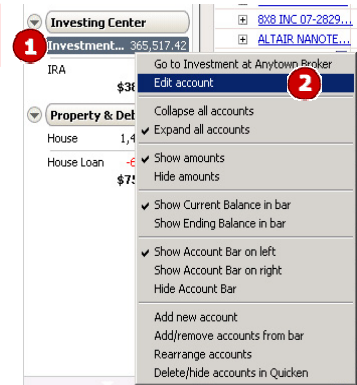
DEACTIVATE YOUR ACCOUNTS WITH YOUR BANK

1. *Quicken banking customers:* right-click your first bank account in the **Cash Flow Center**.
Quicken investing customers: right-click your first bank account in the **Investing Center**.
2. Select **Edit account** from the pop-up menu. **Edit account number, etc. as needed.**

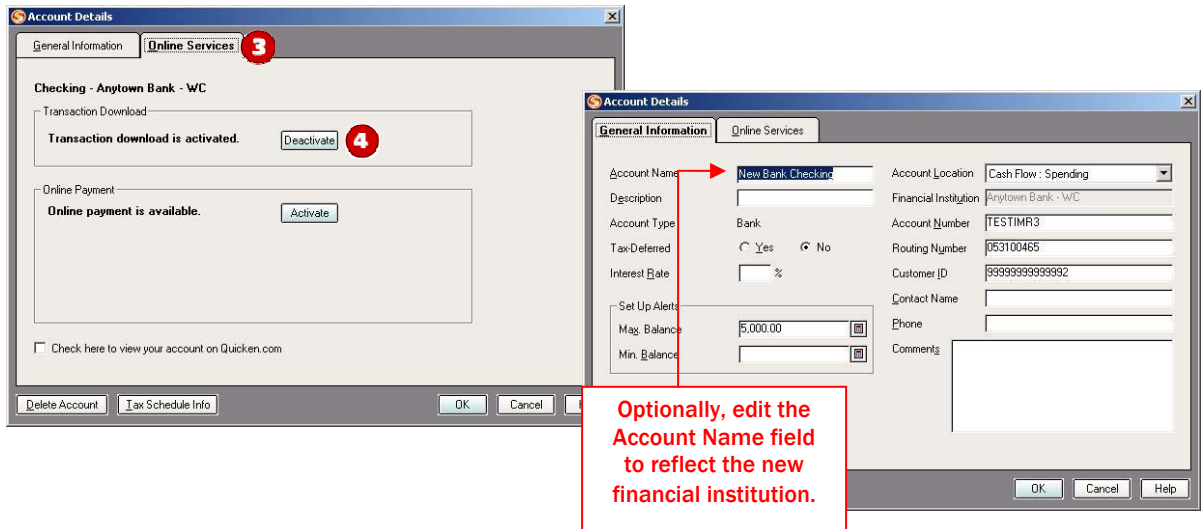
Banking Customers



Investing Customers



3. In the **Account Details** dialog, click the **Online Services** tab.



4. Click **Deactivate** in the **Transaction Download** area. Confirm the remaining prompts.
 5. Click **OK** to close the **Account Details** dialog.
- Repeat steps **1** through **5** for each bank account from which you download transactions.

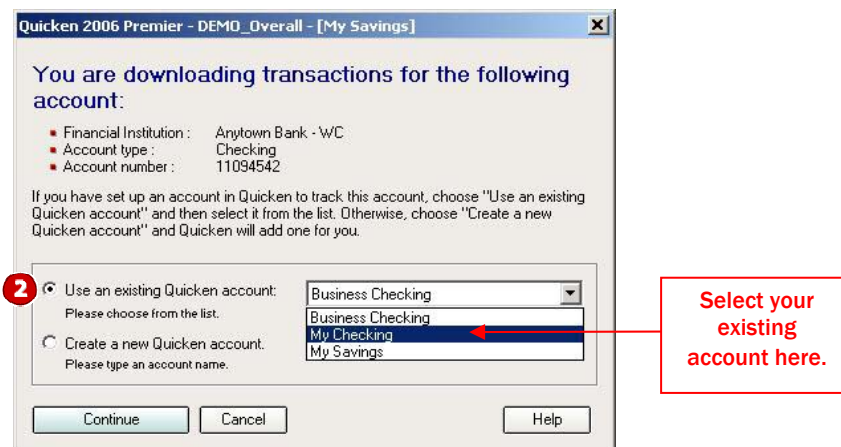
IMPORTANT: Complete section **E** on or after July 27, 2009.



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!

If you have any questions regarding these instructions, then click <http://www.quicken.com/conversionfaqs> to access **Quicken FAQs for Financial Institution Conversion Customers**.

You may also refer to: <http://www.intuit.com/support/quicken>.