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

As your financial institution completes its system conversion, you will need to modify your Quicken settings to ensure the smooth transition of your data. You will need your customer ID and PIN and to be able to log in to the Web site. **This update may be time sensitive.**

It is important that you perform the following instructions exactly as described and in the order presented. If you do not, your online service may stop functioning properly. This conversion should take 15–30 minutes.

To see how your downloading experience will change after your account conversion, click [here].

Note: In the following screen shots, red icon numbers match step number instructions. All financial institution and register information is fictitious and for illustration only.

Throughout this guide, this symbol displays to indicate that there are optional FAQs.

A. BACK UP YOUR CURRENT DATA
(ALL customers)

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.

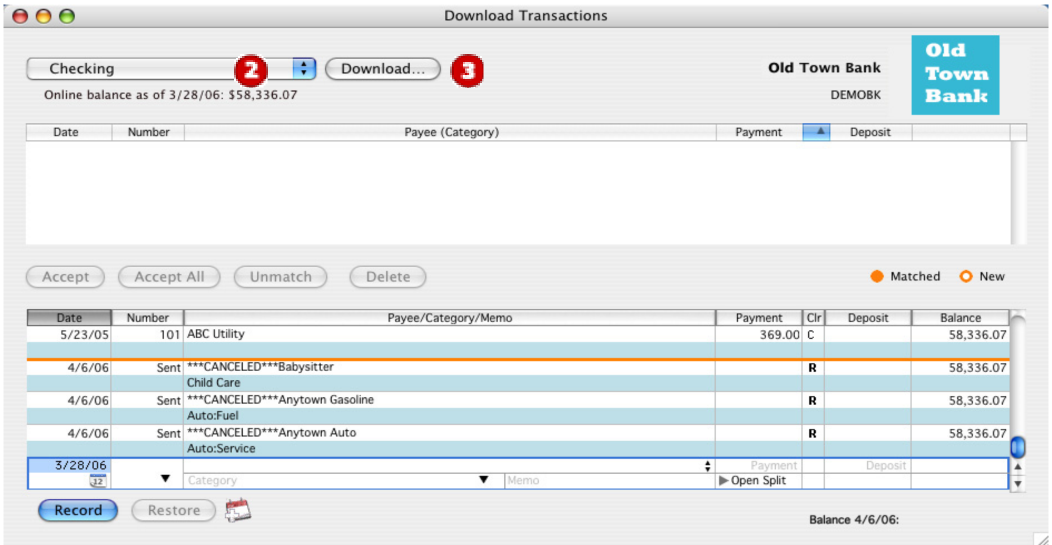
B. DOWNLOAD THE LATEST QUICKEN UPDATE
(ALL customers)

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
(ALL customers)

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



2. Click to select your account from the drop-down list.

3. Click **Download…**.

4. Enter your PIN or PIN Vault PIN, and click **OK**.

5. If new transactions display in the **Download Transactions** dialog, then accept them in your Quicken account register.

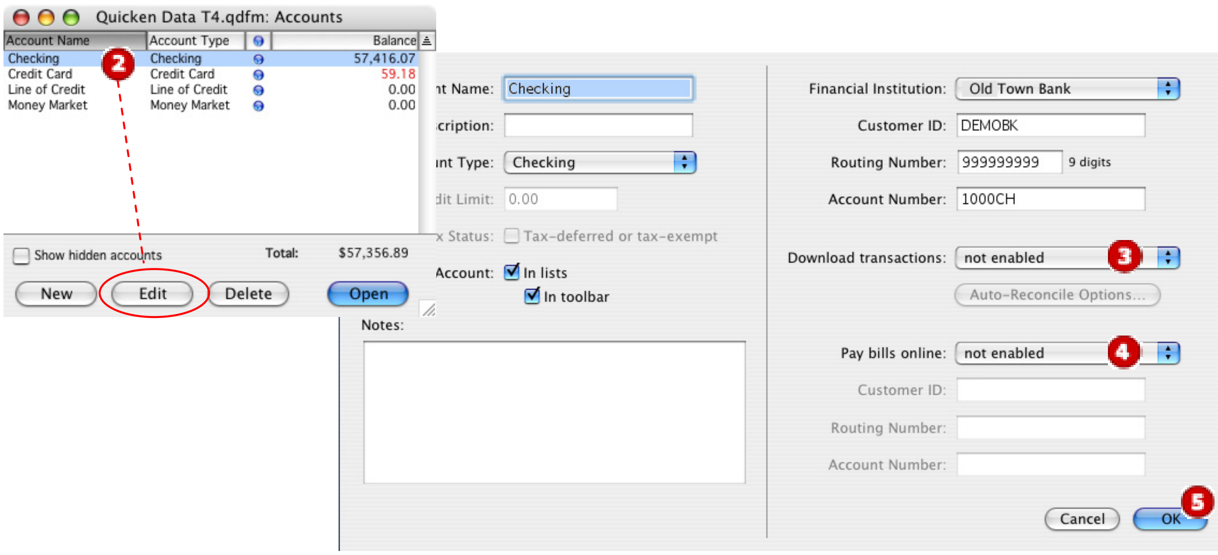
   - For assistance accepting transactions, choose **Help** menu → **Quicken Help**. In the **Ask a Question** prompt, enter *Downloading my account statement*. Specific instructions list under the *Updating your register* section.

   - For help reconciling your account register, choose **Help** menu → **Quicken Help**. Under contents, click *Accounts*. Under Accounts, click *reconcile an account*.

D. DISABLE YOUR ACCOUNTS
(ALL customers)

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

2. Select the account you want to disable, and click **Edit**.

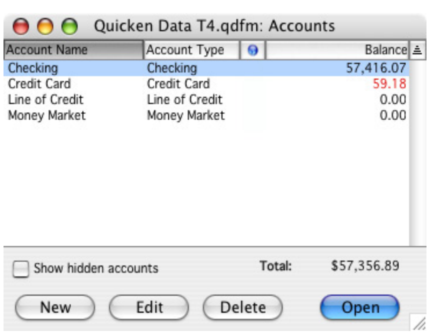


3. In the **Download transactions:** drop-down list, select **not enabled**. Click **OK** to the prompt, "You are about to disable…"

4. If you use online payment, then select **not enabled** in the **Pay bills online:** drop-down list. Click **OK** to the prompt, "You are about to disable…"

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

Repeat steps **2** through **5** for each online account (such as checking, savings, credit cards, and brokerage). As each online account is disabled, its blue online circle icon disappears.



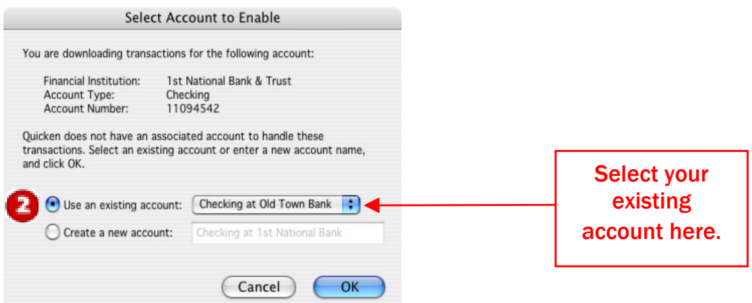
Verify that your account list does not display blue online circle icons for any accounts.

E. ENABLE YOUR ACCOUNTS
(ALL customers)

1. Anytime on or after the conversion date, log in to the financial institution'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.

2. Click the **Use an existing Quicken account** radio button. In the corresponding drop-down list, select the first Quicken account.



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

You Are Done

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.**