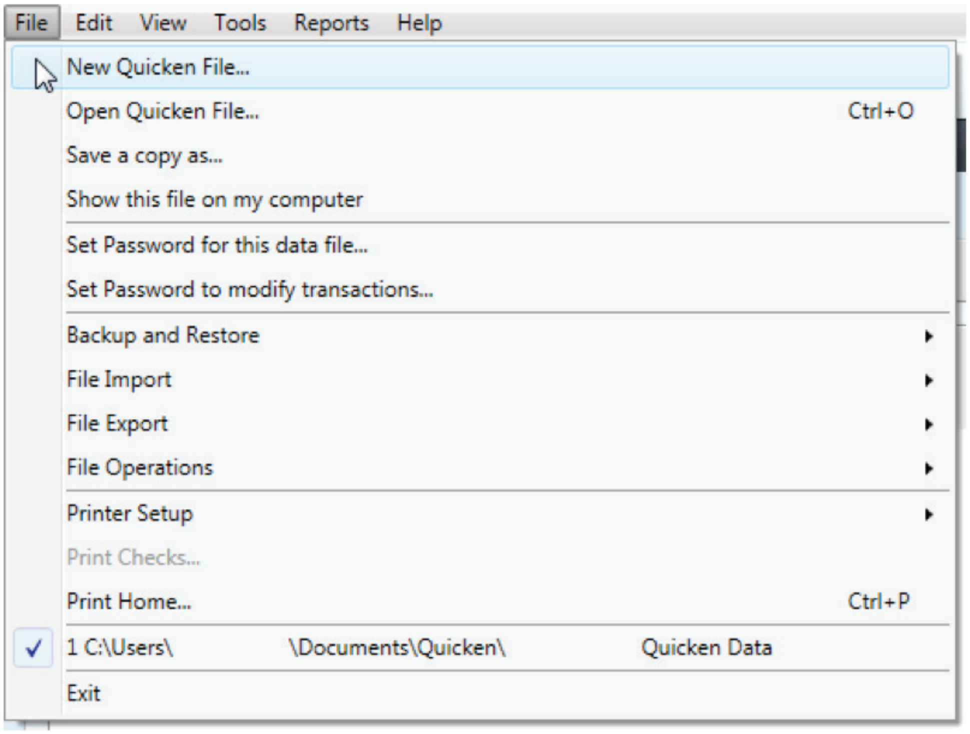
Commonwealth

Quicken Download Steps

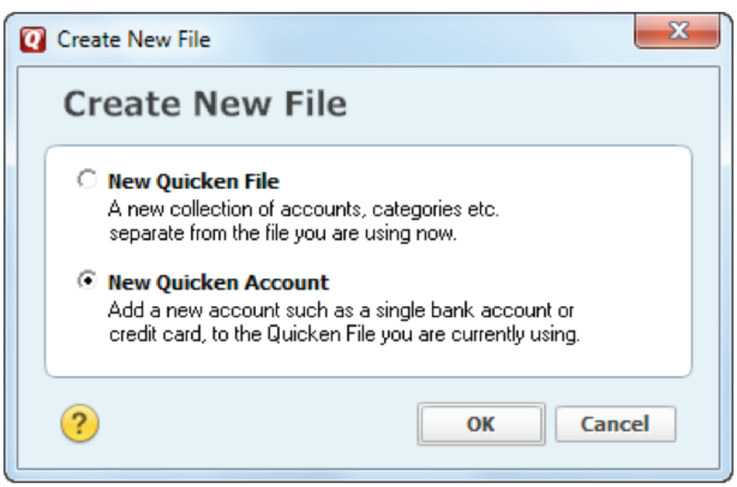
User Guide

Quicken Download Steps

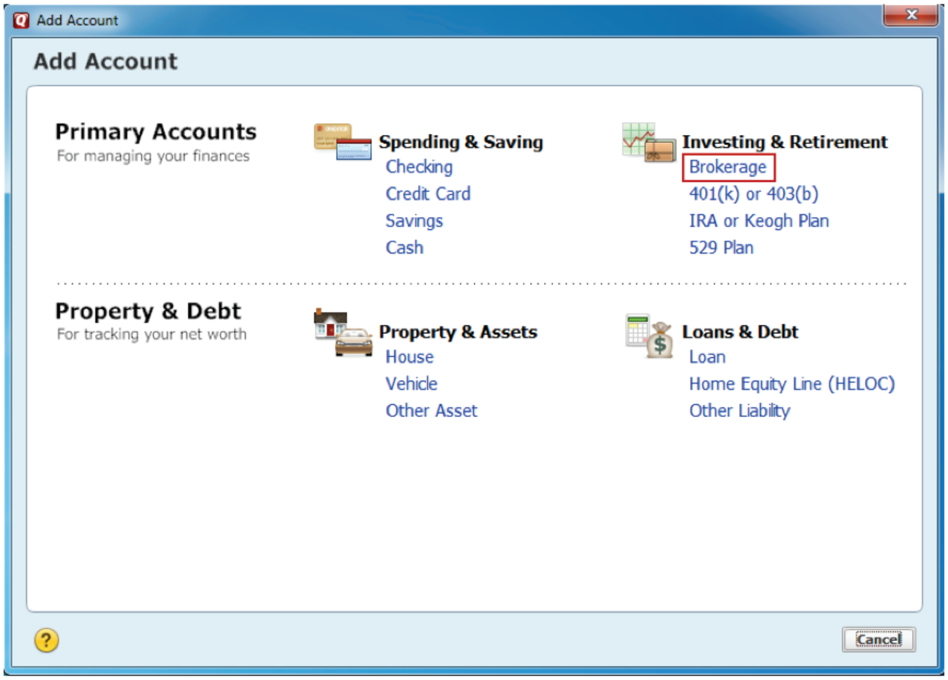
1. Click **File** and choose **New Quicken File.**



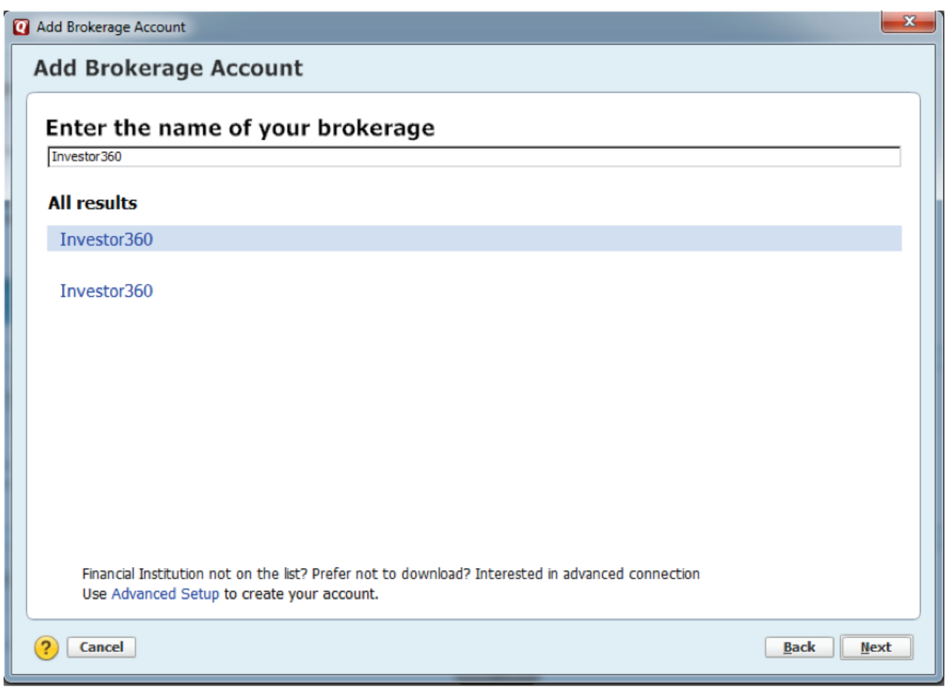
2. In the Create New File box, select **New Quicken Account**.



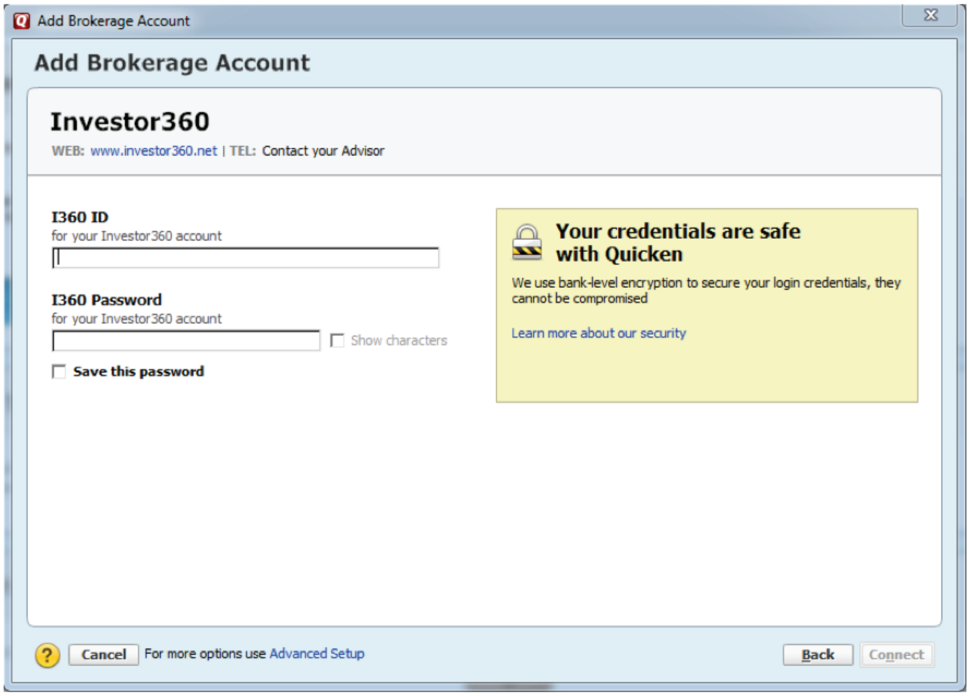
3. In the Add Account window, select **Brokerage** from the Investing & Retirement column as your account type.



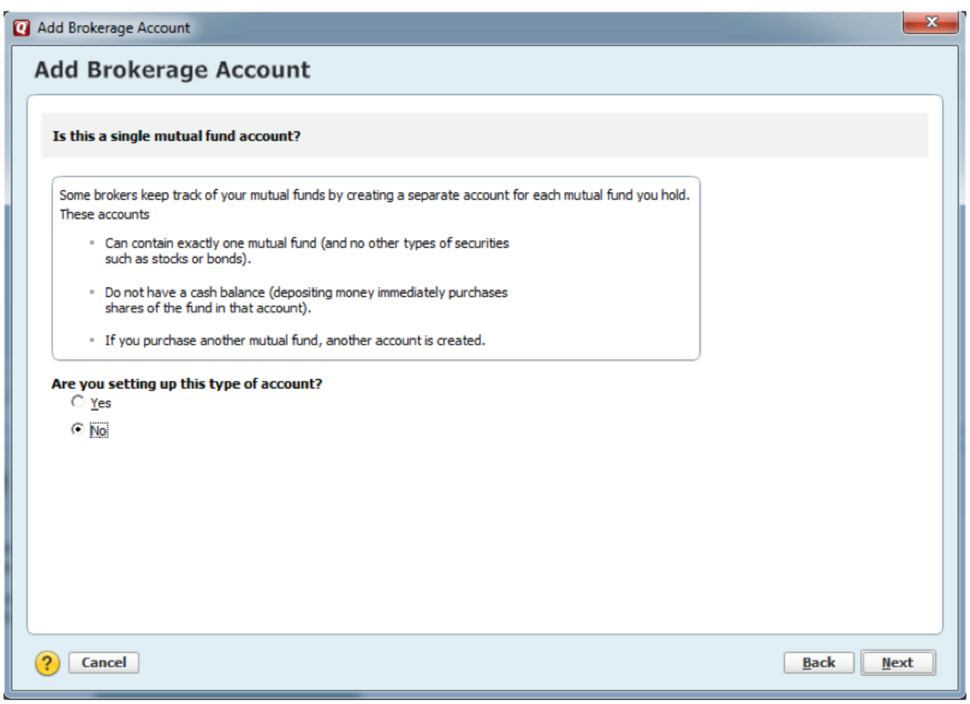
4. In the Add Brokerage Account window, enter "Investor360" as your institution.



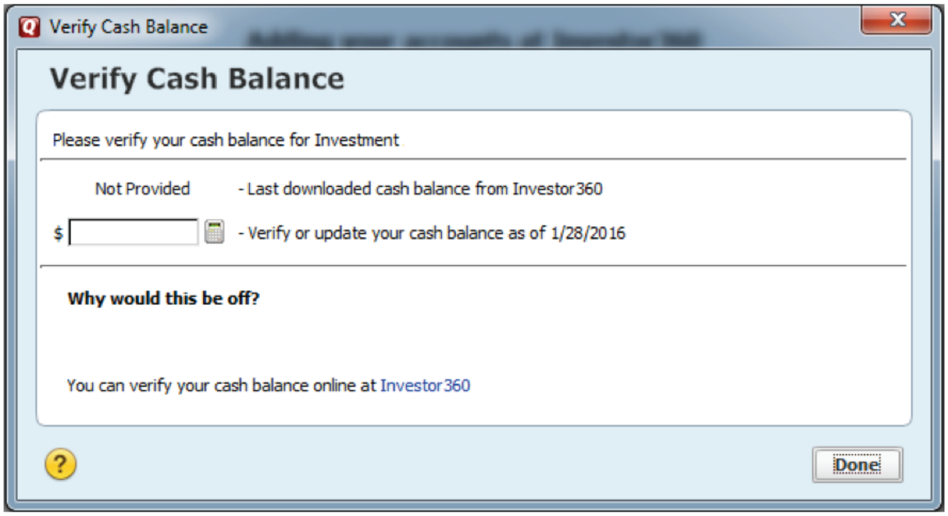
5. Enter your Investor360° user ID and password, and click **Connect**.



6. You may also be prompted to indicate whether your account is a single mutual fund account. If you are prompted, select **No** and click **Next**.



7. Enter “0.00” for starting cash and click **Done**.



8. Your accounts have been added. Click **Finish**.