Quicken Download Steps

User Guide

Quicken Download Steps

1. Click File and choose New Quicken File.

File	Edit	View	Tools	Reports	Help				
	New Q	uicken	File						
	Open	Quicker	n File						Ctrl+O
	Save a	copy a	S						
	Show t	this file	on my c	omputer					
	Set Pa	ssword	for this (data file					
	Set Pa	ssword	to modi	fy transact	ions				
	Backup	o and R	estore						•
	File Im	port							•
	File Ex	port							•
	File Op	peration	15						•
	Printer	Setup							•
	Print C	hecks							
	Print H	lome							Ctrl+P
\checkmark	1 C:\U	sers\		\Docume	nts\Quicke	en\	Quicken Data	3	
	Exit								

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.

Add Account		
Add Account		
Primary Accounts For managing your finances	Spending & Saving Checking Credit Card Savings Cash	Investing & Retirement Brokerage 401(k) or 403(b) IRA or Keogh Plan 529 Plan
Property & Debt For tracking your net worth	Property & Assets House Vehicle	Loans & Debt Loan Home Equity Line (HELOC)
	Other Asset	Other Liability
?		Cance

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

Add Brokerage Account	×
Add Brokerage Account	
Enter the name of your brokerage	
Investor360	
All results	
Investor360	
Investor360	
Financial Institution not on the list? Prefer not to download? Interested in advanced connection Use Advanced Setup to create your account.	
? Cancel	<u>B</u> ack Next

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

Investor360 WEB: www.investor360.net TEL: Contact your Advisor	
I360 ID for your Investor360 account I360 Password for your Investor360 account Show characters Save this password	Your credentials are safe with Quicken We use bank-level encryption to secure your login credentials, they cannot be compromised Learn more about our security

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**.

du brokerage Account	t	
is this a single mutual fund account?		
Some brokers keep track of your mutual fu These accounts • Can contain exactly one mutual fu	inds by creating a separate account for each mutual fund you ho ind (and no other types of securities	id.
such as stocks or bonds). - Do not have a cash balance (depo shares of the fund in that account	· · · · · · · · · · · · · · · · · · ·	
If you purchase another mutual fu	nd, another account is created.	
C <u>Y</u> es ⊙ Na	nt <i>?</i>	
· ENM		

7. Enter "0.00" for starting cash and click **Done**.

Verify Cash Balance	x
Verify Cash Balance	
Please verify your cash balance for Investment.	
Not Provided - Last downloaded cash balance from Investor360	
\$ - Verify or update your cash balance as of 1/28/2016	
Why would this be off?	
You can verify your cash balance online at Investor360	

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

Account Added
Account Added
Investor360 WEB: www.investor360.net TEL: Contact your Advisor
V Investment XXXX123 Downloaded transactions from the last 1 days.
The number of days of transactions that Quicken downloads is determined by your financial institution. Most financial institutions provide 90 days of your most recent transactions, but this number can vary based on financial institution policy.
? Add another account Finish