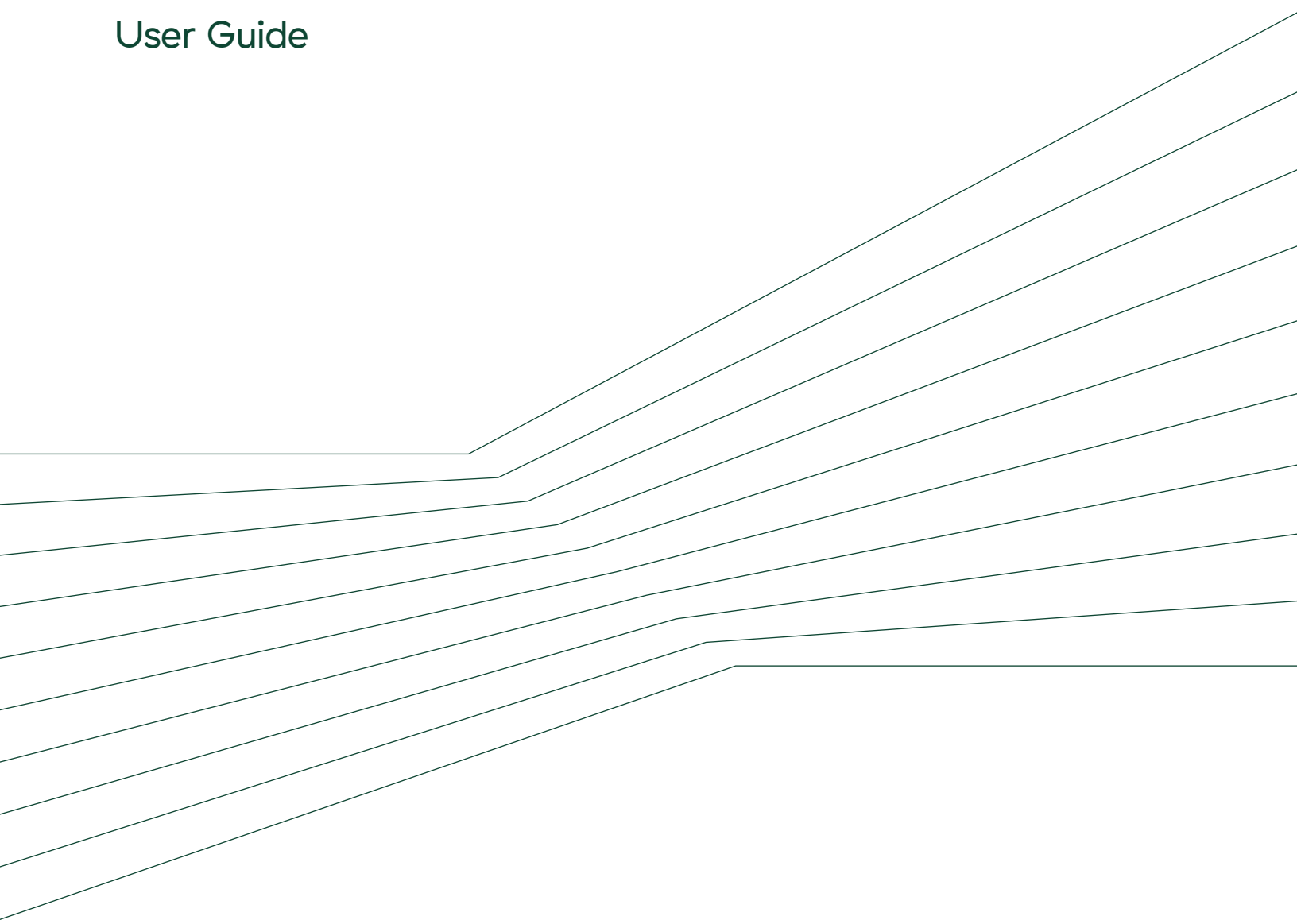


Quicken Download Steps

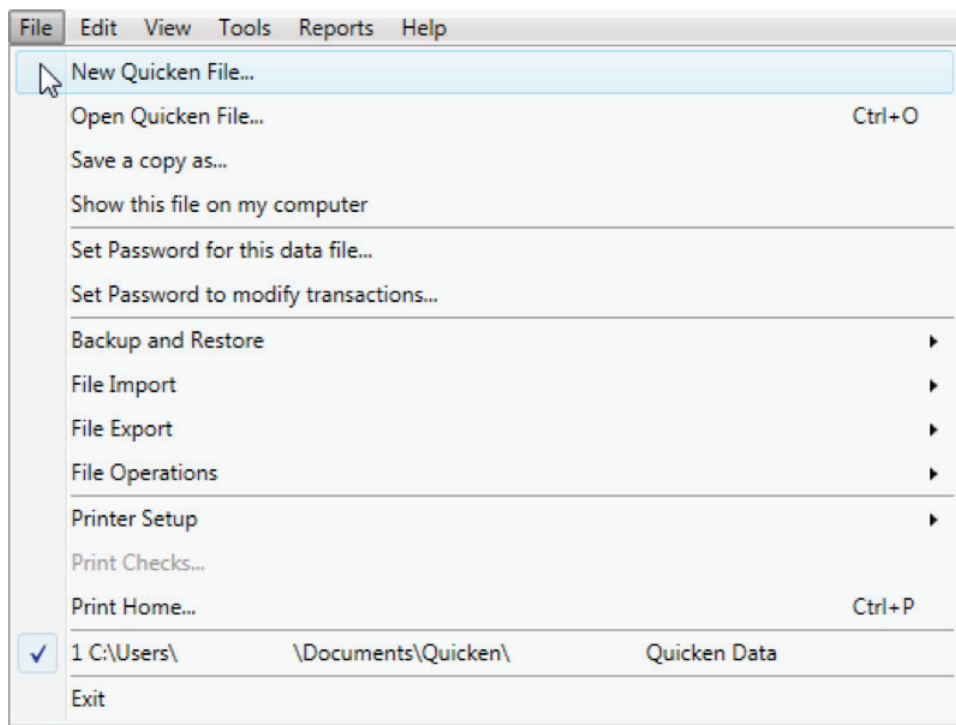
User Guide



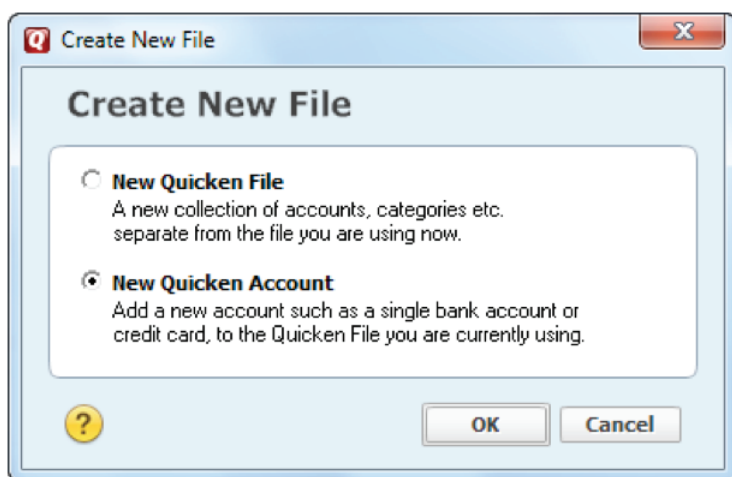


Quicken Download Steps

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

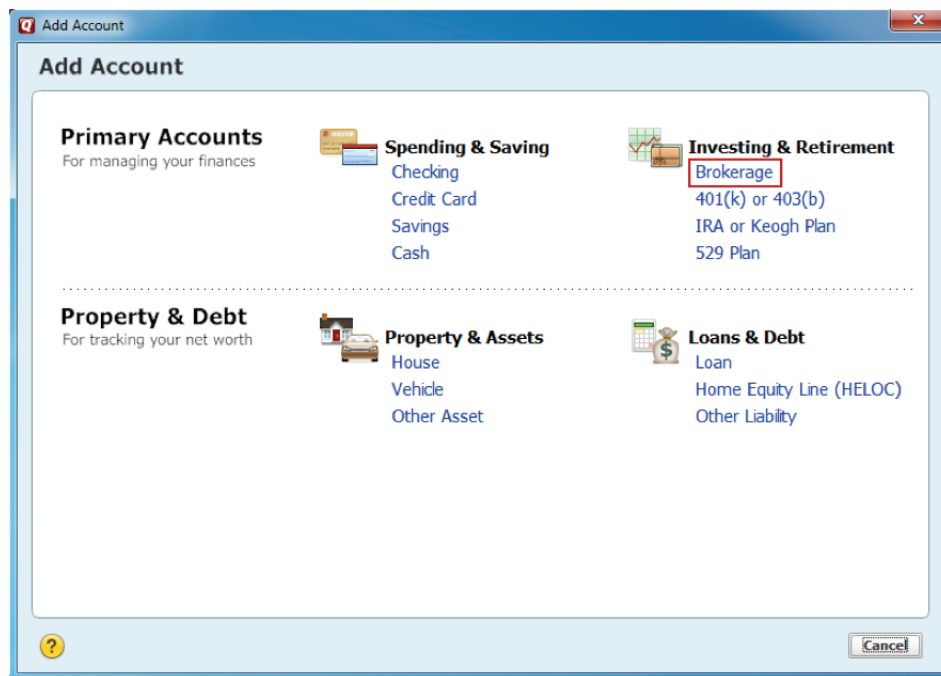


2. In the Create New File box, select **New Quicken Account**.

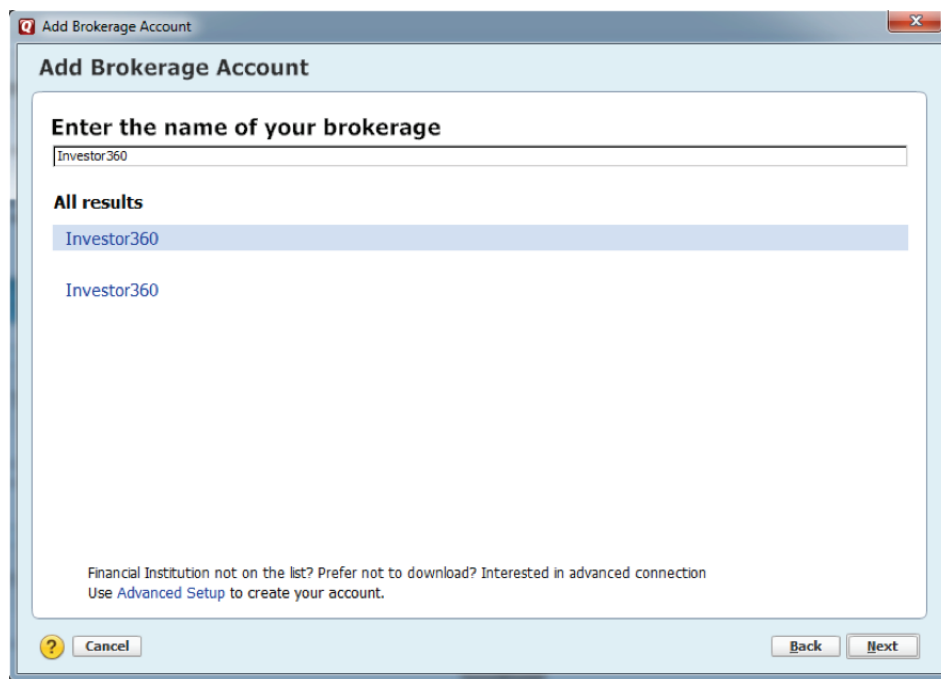




3. In the Add Account window, select **Brokerage** from the Investing & Retirement column as your account type.



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





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

Add Brokerage Account

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](#)

For more options use [Advanced Setup](#)

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**.

Add Brokerage Account

Is this a single mutual fund account?

Some brokers keep track of your mutual funds by creating a separate account for each mutual fund you hold. These accounts

- Can contain exactly one mutual fund (and no other types of securities such as stocks or bonds).
- Do not have a cash balance (depositing money immediately purchases shares of the fund in that account).
- If you purchase another mutual fund, another account is created.

Are you setting up this type of account?

Yes
 No



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

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](#)

Done

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

Account Added

Investor360
WEB: www.investor360.net | TEL: Contact your Advisor

✓ 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