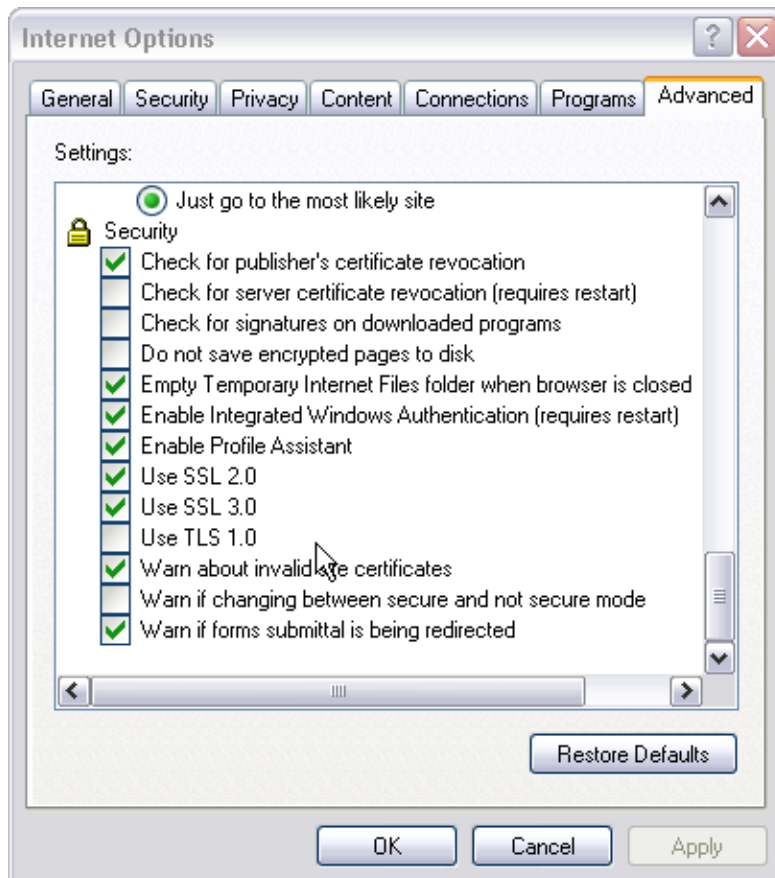


## Quicken® / 4myaccount! Integration User Guide

### Prepare to download account information

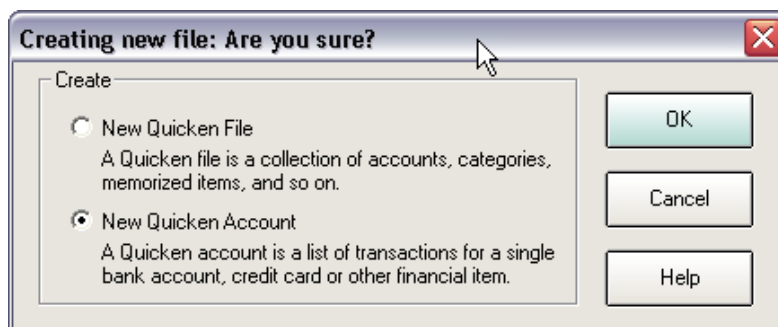
Launch Internet Explorer, select the **Tools** menu, and then select **Internet Options**. Select the **Advanced** tab and scroll to the **Security** section. Verify that the **Use TLS 1.0** checkbox is *unchecked*. If necessary, uncheck the box, click **Apply** and click **OK**.



### Add a new account to Quicken

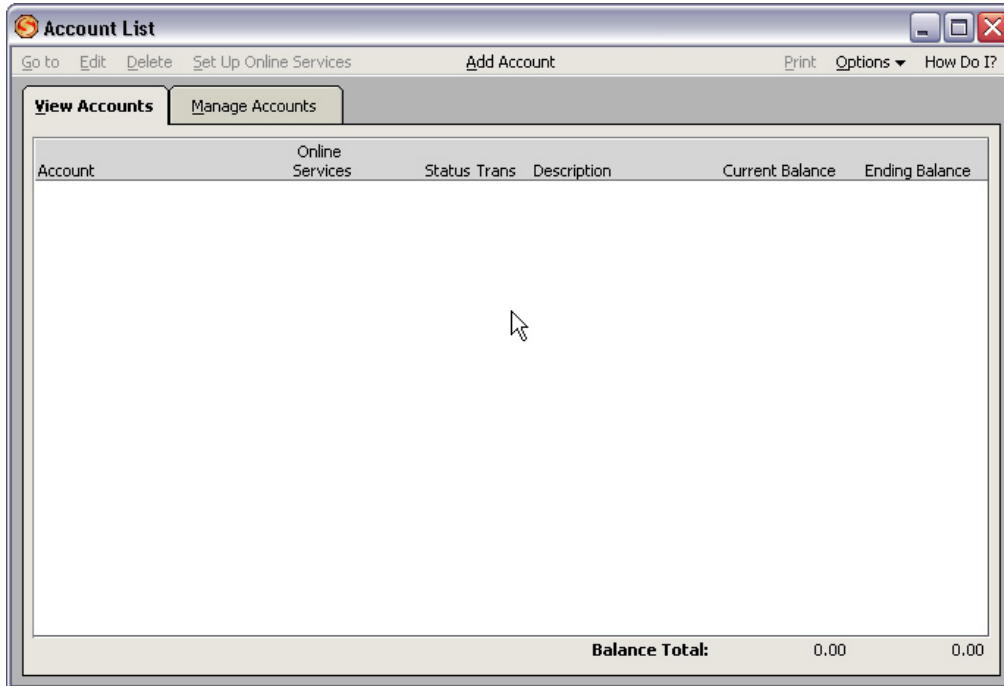
#### Step 1: Add a new unspecified account

Launch Quicken 2005. From the **File** menu select **New**. In the **Create** field of Creating new file window, click the **New Quicken Account** button. Proceed to Step 2.



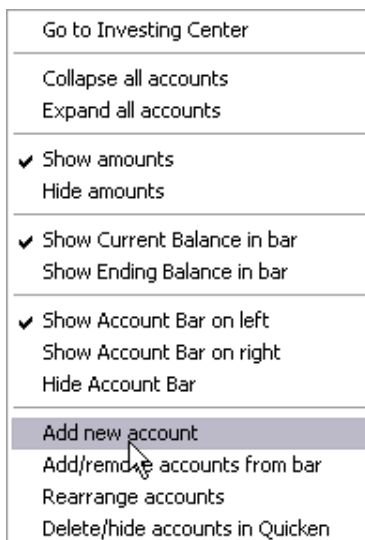
**Or**

From the **Tools** menu, select **Account List**, or press **Ctrl + A**. In the Account List window, click **Add Account** in the center of the menu bar, or press **Alt + A**. Proceed to Step 2.



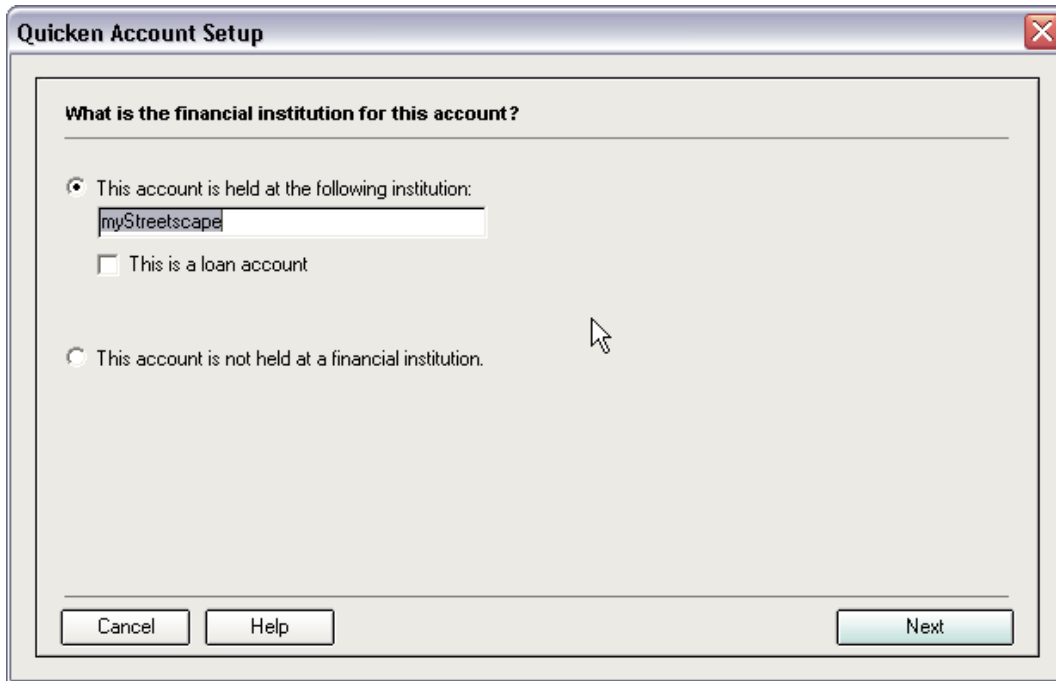
**Or**

From Quicken Home, right-click on the **Account Bar** and select **Add new account**. Proceed to Step 2.



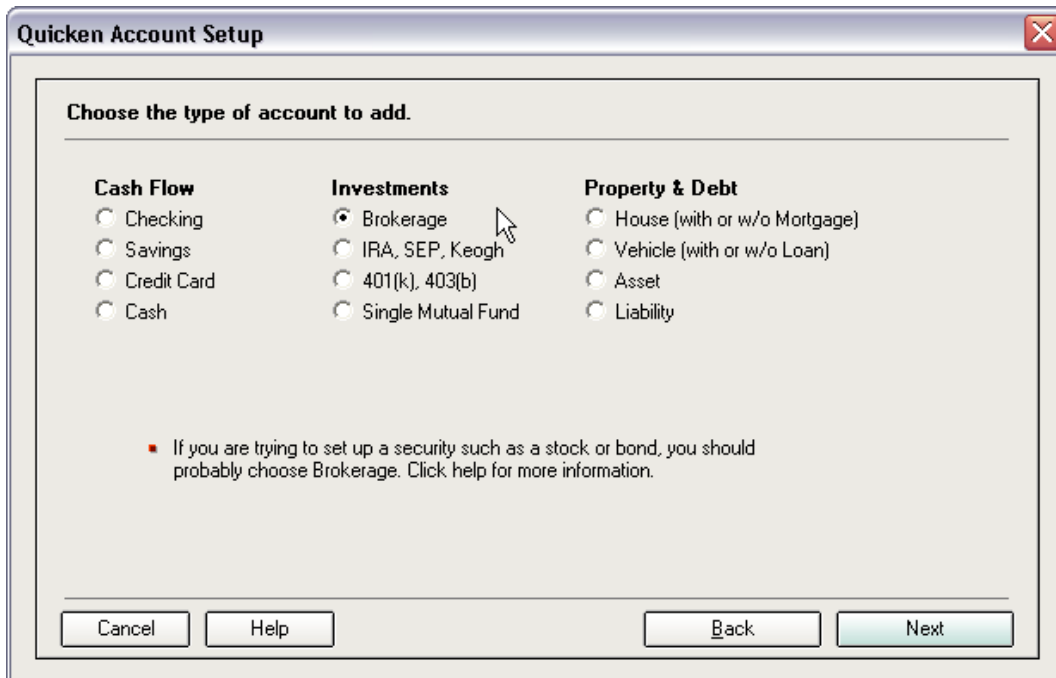
### **Step 2: Enter institution**

In the **Quicken Account Setup** window, verify that the button for **This account is held at the following institution:** is selected and enter **myStreetscape** in that field (**Note:** myStreetscape is the financial institution hosting your *4myaccount!* account.) Verify that the **This is a loan account** checkbox is *not* checked. Click **Next**.



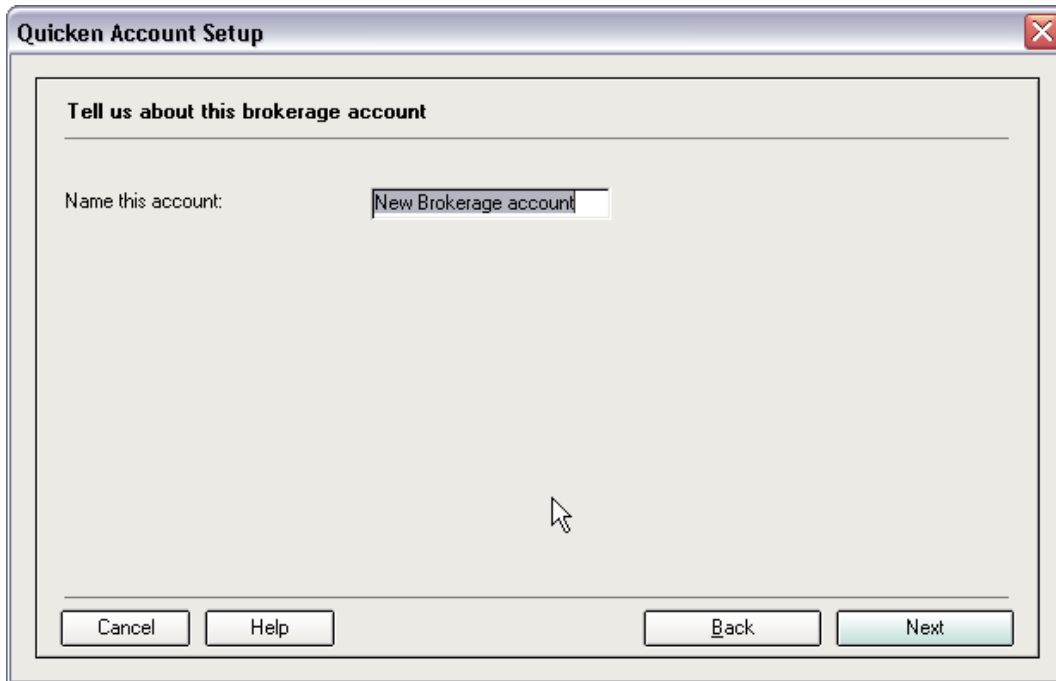
### Step 3: Select type

On the **Choose the type of account to add** page, select the appropriate button from the **Investments** column (e.g., Brokerage; IRA, SEP, Keogh; 401(k), 403(b); or Single Mutual Fund). Click **Next**.



#### Step 4: Name the account

Enter a name to identify this account. Click **Next**.

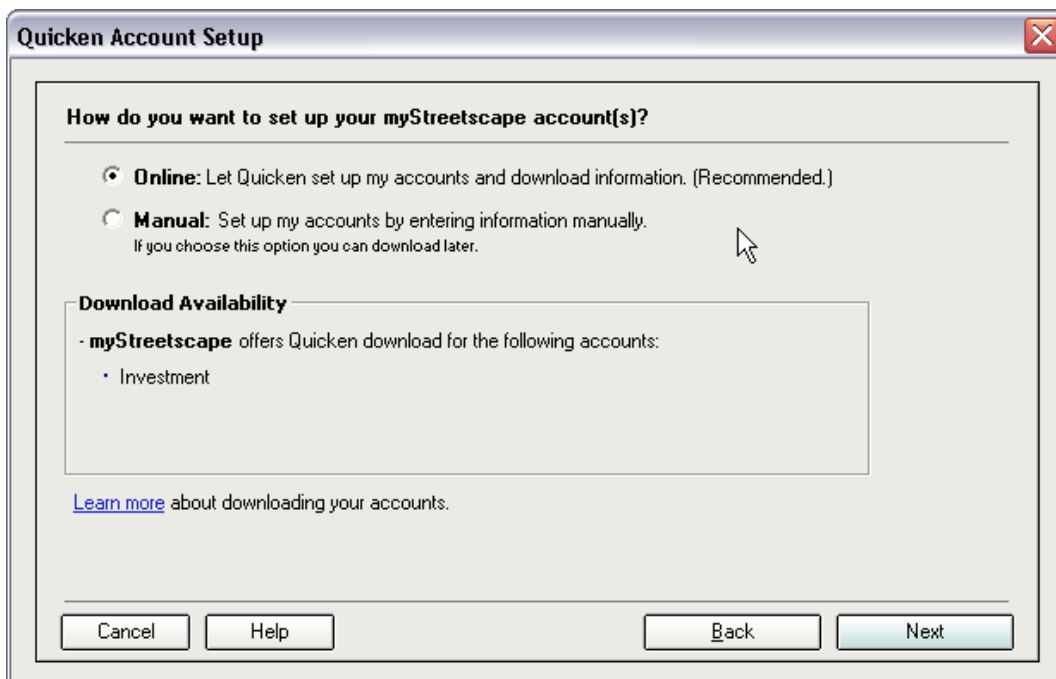


The screenshot shows a window titled "Quicken Account Setup" with a close button in the top right corner. The main content area is titled "Tell us about this brokerage account". Below this title, there is a label "Name this account:" followed by a text input field containing the text "New Brokerage account". At the bottom of the window, there are four buttons: "Cancel", "Help", "Back", and "Next".

#### Step 5: Specify account setup method.

Quicken can automatically download information about your account and balances, or you can manually enter this data.

**Note:** myStreetscape, like *4myaccount!*, only retains the previous 90 days of account history. For complete information on accounts older than three months, use previous statements to enter historical data for your account.



The screenshot shows a window titled "Quicken Account Setup" with a close button in the top right corner. The main content area is titled "How do you want to set up your myStreetscape account(s)?". There are two radio button options: "Online: Let Quicken set up my accounts and download information. (Recommended.)" and "Manual: Set up my accounts by entering information manually. If you choose this option you can download later." Below these options is a section titled "Download Availability" which contains a list of account types: "myStreetscape offers Quicken download for the following accounts:" followed by "Investment". At the bottom of this section is a blue hyperlink that says "Learn more about downloading your accounts." At the bottom of the window, there are four buttons: "Cancel", "Help", "Back", and "Next".

### Step 6: Enter Customer ID and PIN

To connect to myStreetscape, you'll need to enter your account credentials. These are the same used to access *4myaccount!*. Enter your 10-digit Customer ID (i.e., 007xxxxxxx) and your 4-8 character numeric PIN. Click **Next**. Quicken will now make an initial connect to myStreetscape.

The screenshot shows a window titled "Quicken Account Setup" with a close button in the top right corner. The main content area is titled "Log in to set up your myStreetscape account(s) in Quicken". On the left, there are two input fields: "Customer ID:" and "PIN:". To the right of these fields is a text box containing the following text: "Need a Customer ID and PIN?", a red bullet point followed by "Your Quicken customer ID and PIN are provided by myStreetscape.", a "Sign Up Now" button, and a link to "myStreetscape Customer Support" with the text "or call your broker/dealer customer serv to sign up" below it. At the bottom of the window, there are four buttons: "Cancel", "Help", "Back", and "Next".

### Step 7: Enter Account Number

Enter the account number of the account you wish to download. **Note:** enter account number with uppercase letters and without dashes (e.g., HDM123456). Click **Next**.

The screenshot shows a window titled "Quicken Account Setup" with a close button in the top right corner. The main content area is titled "Enter your account information." and includes the text "myStreetscape offers transaction download in Quicken." Below this is a large input field labeled "Account Number" with a mouse cursor pointing to it. At the bottom of the window, there are three buttons: "Cancel", "Help", and "Next".

**Step 8: Download transactions**

Quicken displays the account types and names you have entered for this process. Click **Back** to re-enter any information. To download transactions, click **Done**.

Quicken will connect to myStreetscape to download the account history available. When complete, Quicken will automatically enter transactions into Register or present the list of transactions to be accepted.