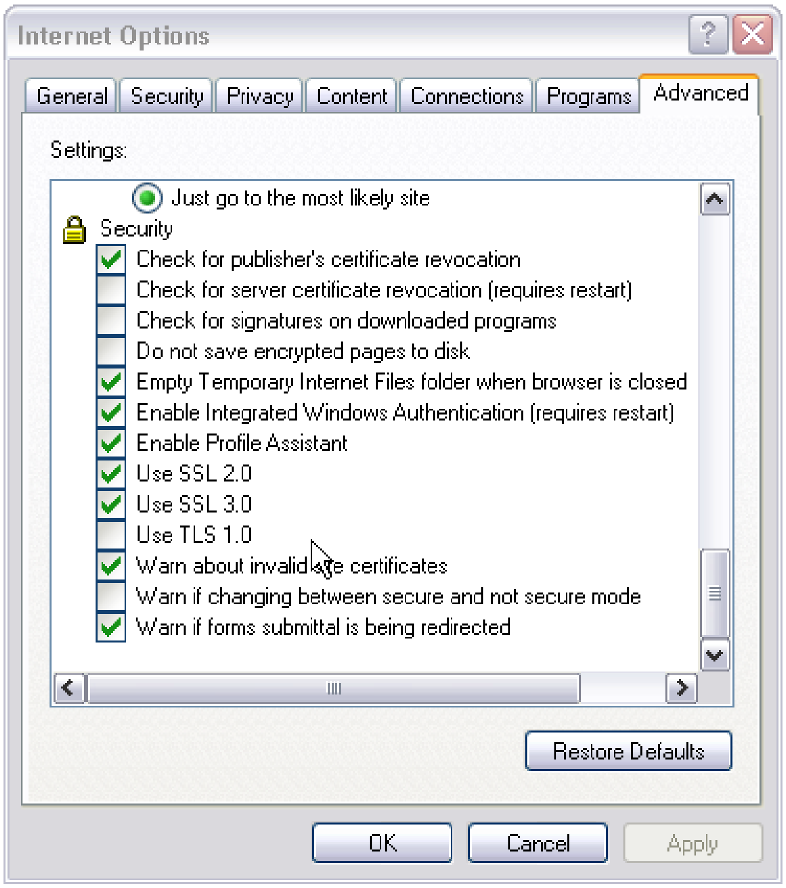
COMMONWEALTH *financial network*℠

Quicken®/*4myaccount!* Integration User Guide

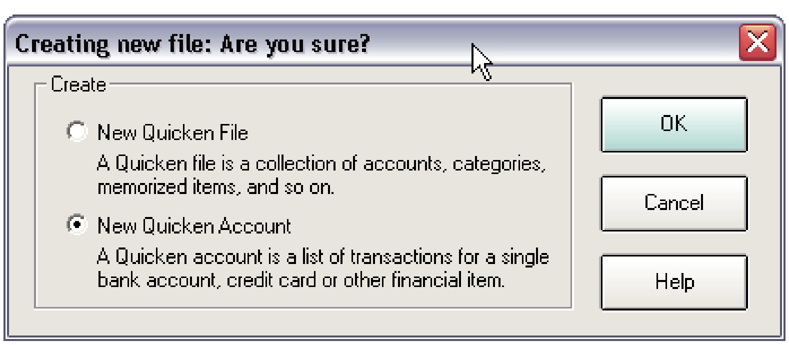
Prepare to download account information

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**.



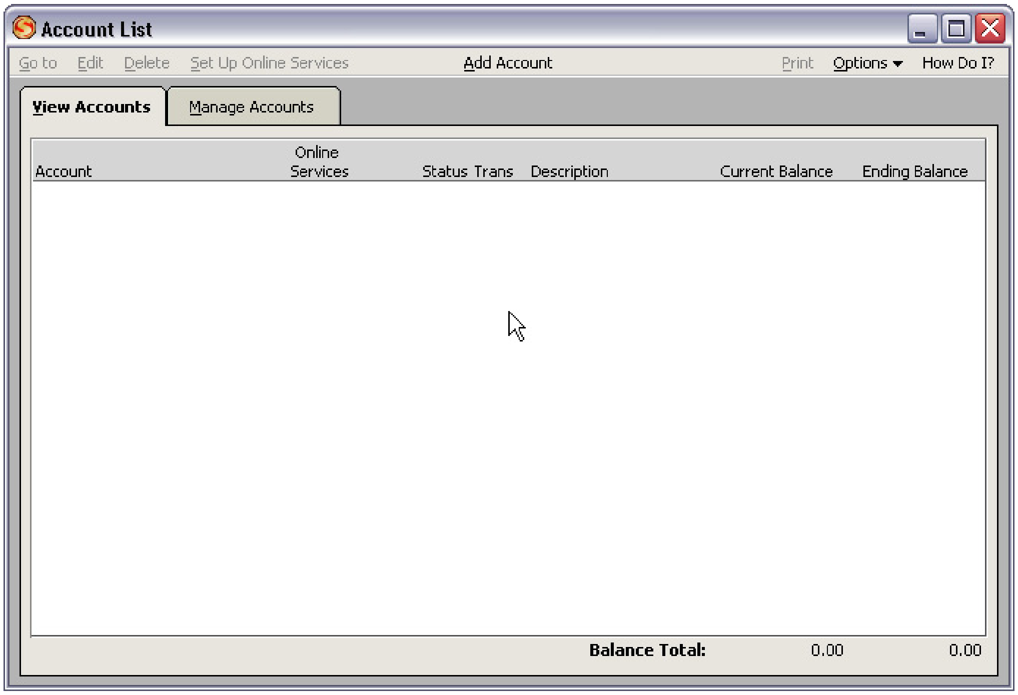
Add a new account to Quicken

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.



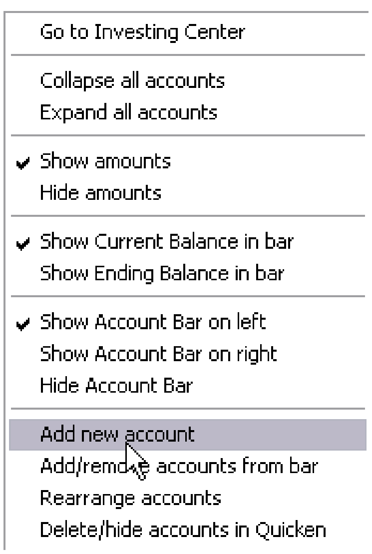
Or

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.

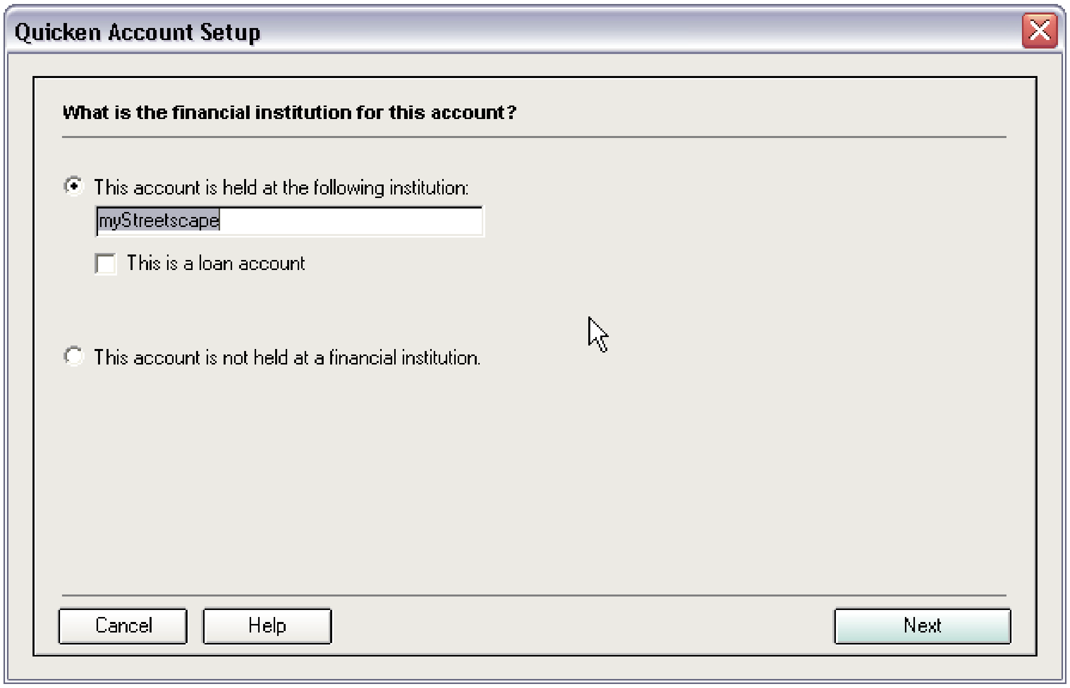


Or

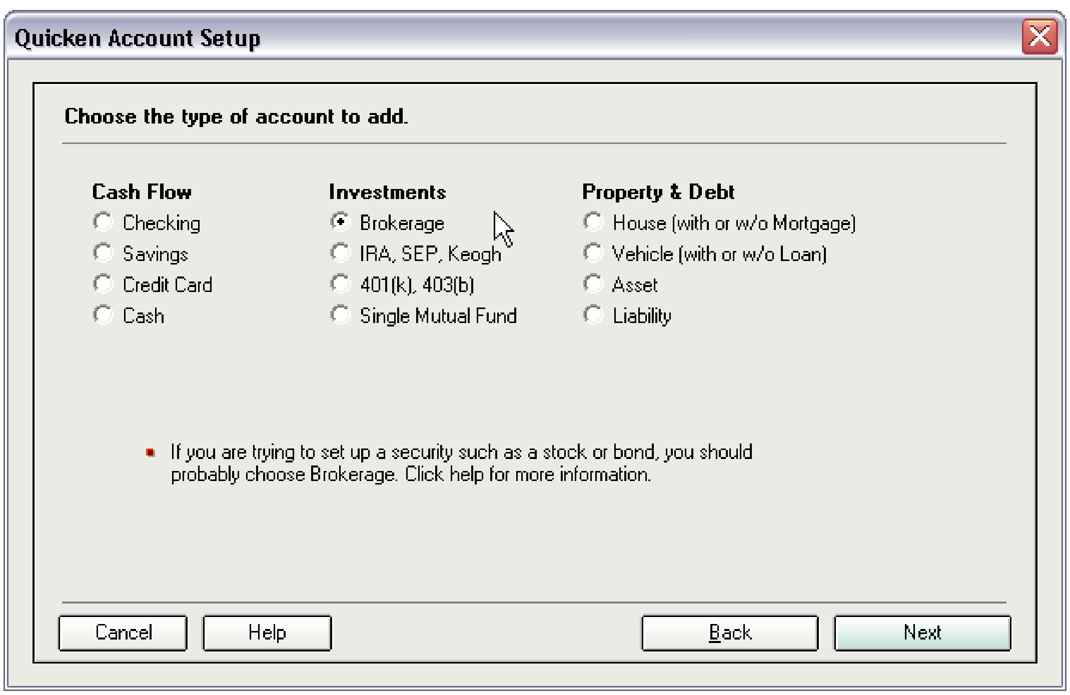
From Quicken Home, right-click on the **Account Bar** and select **Add new account**. Proceed to Step 2.



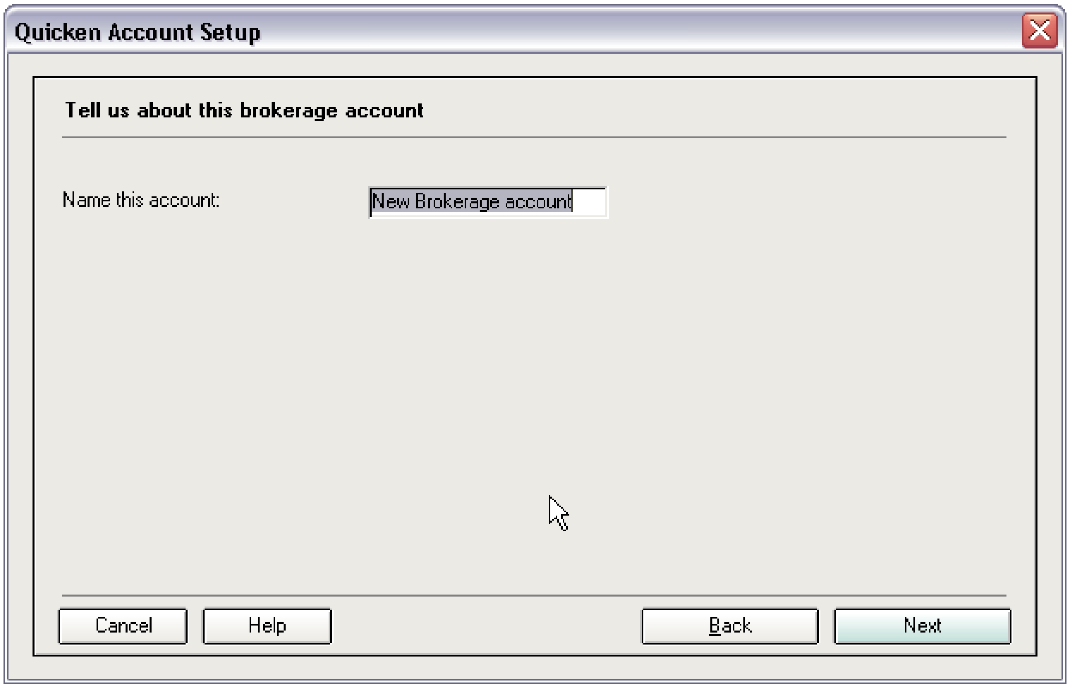
Step 2: Enter institution
In the **Quicken Account Setup** window, verify that the button for **This account is held at the following institution:** is selected and enter **myStreetscape** in that field (**Note:** myStreetscape is the financial institution hosting your *4myaccount!* account.) Verify 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.**



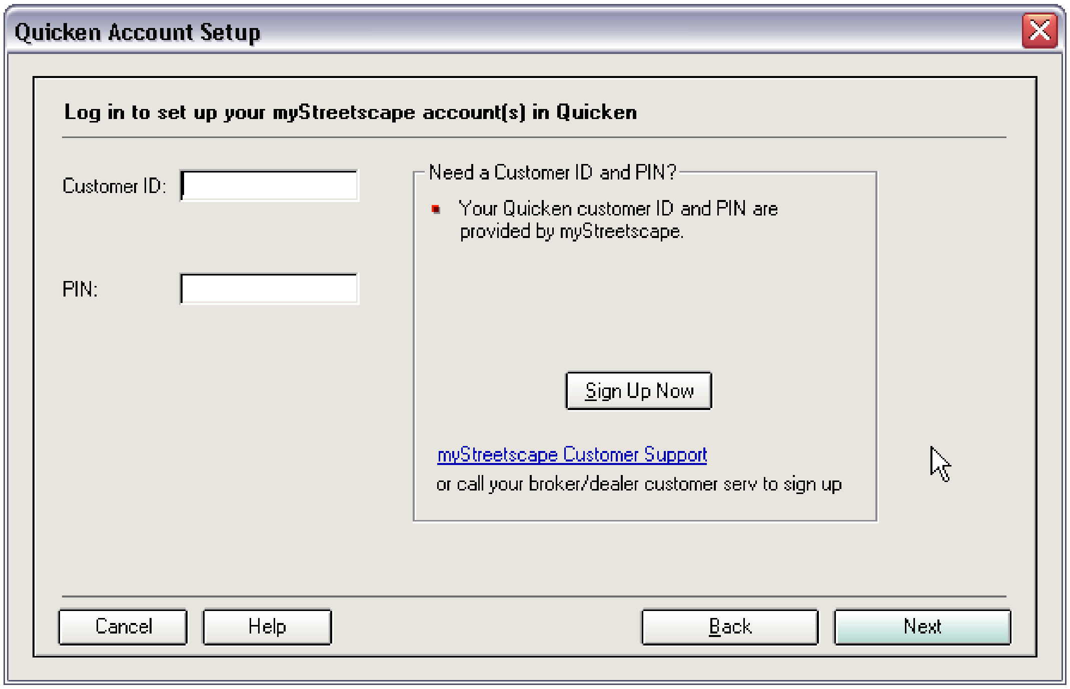
Step 4: Name the account
Enter a name to identify this account. Click **Next**.



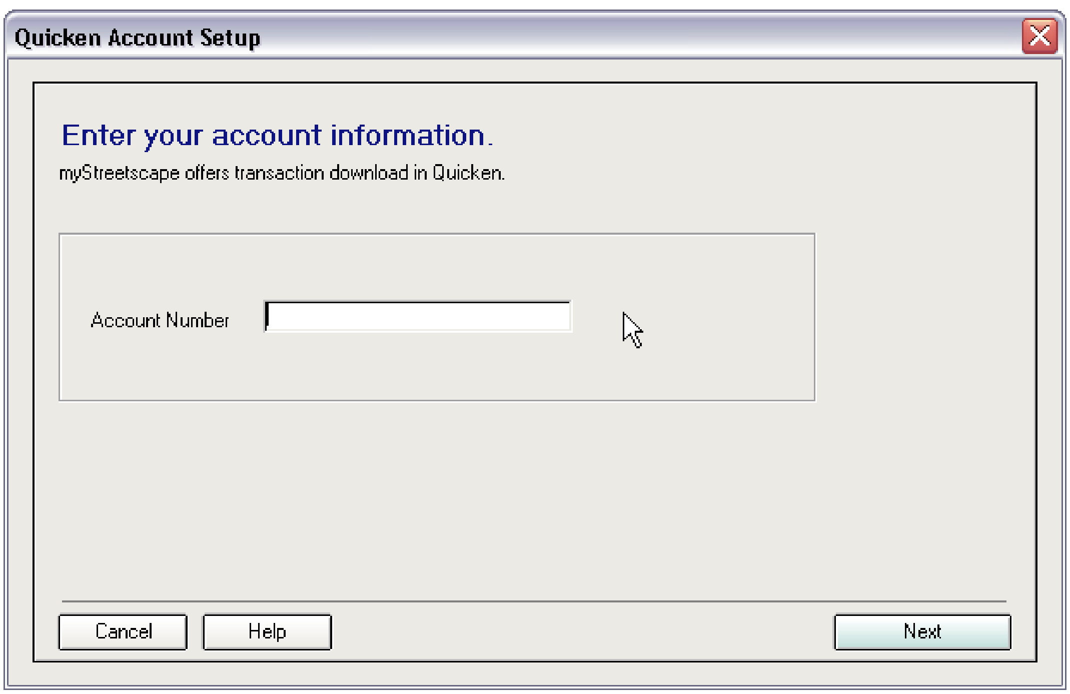
Step 5: Specify account setup method.
Quicken can automatically download information about your account and balances, or you can manually enter this data.

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.

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.



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**.



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.