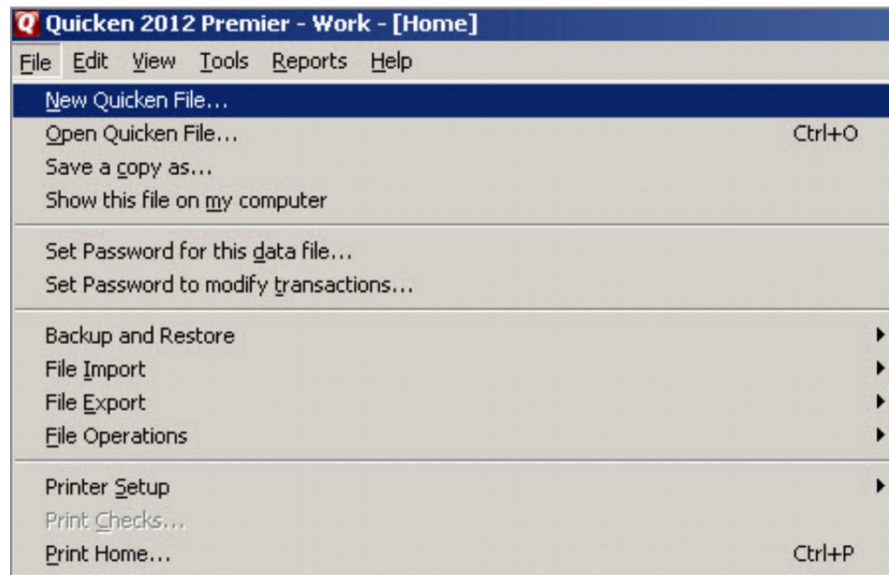


QUICKEN 2014 DOWNLOAD STEPS

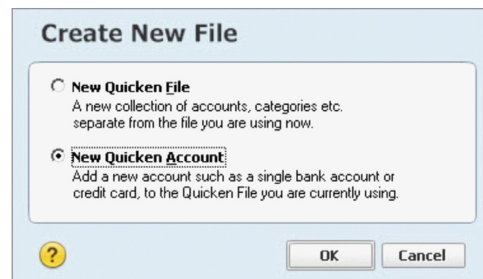
USER GUIDE

QUICKEN 2014 DOWNLOAD STEPS

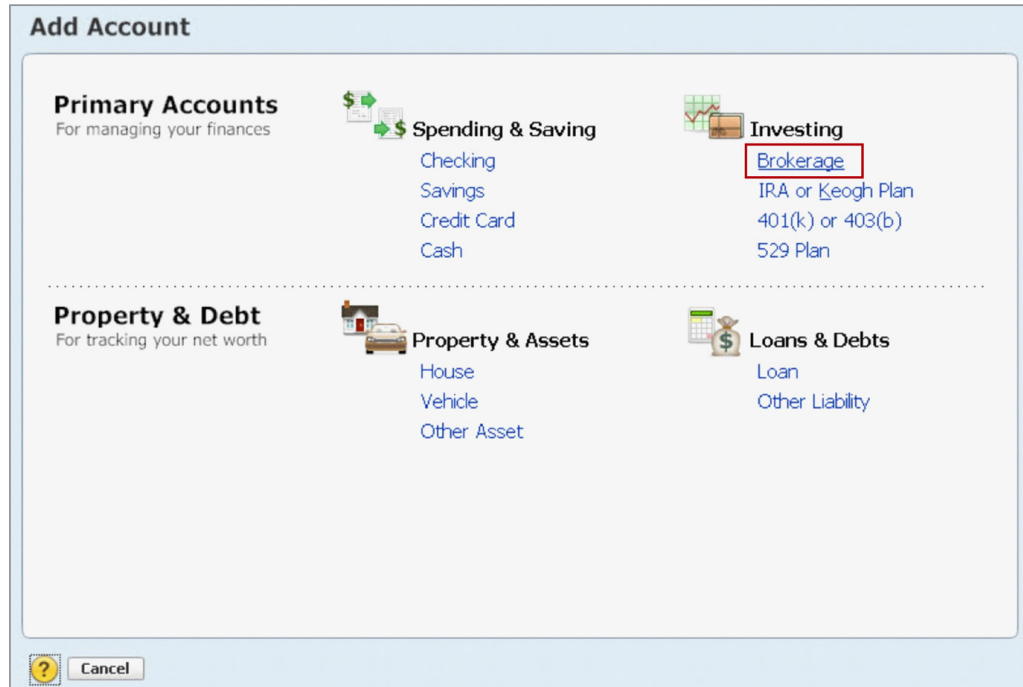
1. Click on **File** and choose **New Quicken File**.



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



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



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

Add Brokerage Account

Enter the name of your brokerage

investor

All results

Investor360

Bank not on the list? Prefer not to download? Interested in advanced connection methods?
Use [Advanced Setup](#) to create your account.

? Cancel Back Next

5. Enter your Investor360° User ID/User Name and Investor360° password and click **Connect**.

Add Brokerage Account


Investor360

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

Investor360 User ID / User Name
for your Investor360 account


Investor360 password
for your Investor360 account

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 are then asked to register with Quicken.
 - If you already have a Quicken Intuit ID, click the **Already have an Intuit ID?** link, enter your Intuit ID and password, and click **Next**.
 - If you do not have a Quicken Intuit ID, complete the registration form by entering an e-mail address, password, security question, and answer. Once complete, click **Next**.

Register Quicken (step 1 of 2)

Create your [Intuit ID](#) to get connected

Email
 This will be your Intuit ID

Password
 At least 6 but no more than 32 characters, no spaces.

Confirm Password

Security Question

Answer
 Use this if you ever need to recover your password.

[Use Quicken without connecting](#)

[Already have an Intuit ID?](#)

You can use the same Intuit ID you use for:

Quicken.com

Investing.Quicken.com

TurboTax ✓

QuickBooks

Next

- 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

? Cancel Back Next

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

Accounts Added

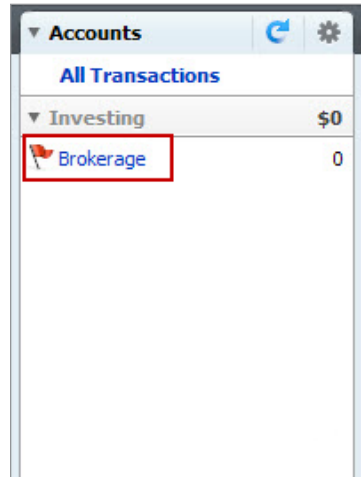
Investor360
WEB: www.investor360.net | TEL: Contact your Advisor

- ✓ Investment XX1234
Downloaded transactions from the last 1 days.
- ✓ Investment XX2345
Downloaded transactions from the last 1 days.
- ✓ Investment XX3456
Downloaded transactions from the last 1 days.
- ✓ Investment XX4567
Downloaded transactions from the last 1 days.
- ✓ Investment XX5678
Downloaded transactions from the last 1 days.
- ✓ Investment XX6789
Downloaded transactions from the last 1 days.
- ✓ Investment XX7890
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

9. Select your new account from the account list.



9. Enter **0.00** for starting cash and click **Done**. Your transactions appear.
Please note: Only 90 days of transactions will appear.

Verify Cash Balance

Please verify your cash balance for Brokerage

Not Provided - Last downloaded cash balance from Investor360

\$ - Verify or update your cash balance as of 12/27/2012

Why would this be off?

You can verify your cash balance online at [myStreetscape](#)