GETTING STARTED WITH QUICKEN®
2012 for Windows ®

Refer to this guide for instructions on how to use Quicken's online account services to save time and automatically keep your records up to date.

Edward Jones

Before you can download your transactions with Quicken you will need internet access, your customer ID and your password.

Your Quicken Customer ID and Password are the UserID and password that you use to logon to AccountLink

This Getting Started Guide contains the following information:

- **Downloading the Latest Quicken Updates**-How to download free product updates as they become available for your version of Quicken.
- **Creating a New Quicken Account**- How to create a new Quicken account for downloading transactions.
- **Keeping your Quicken Accounts Up to date**-How to download transactions for accounts that you have activated for online account services.

For step-by-step instructions with an online task (or any other Quicken question) go to Help → Quicken Help → select the Search Quick Help tab and type in the topic and click Ask.

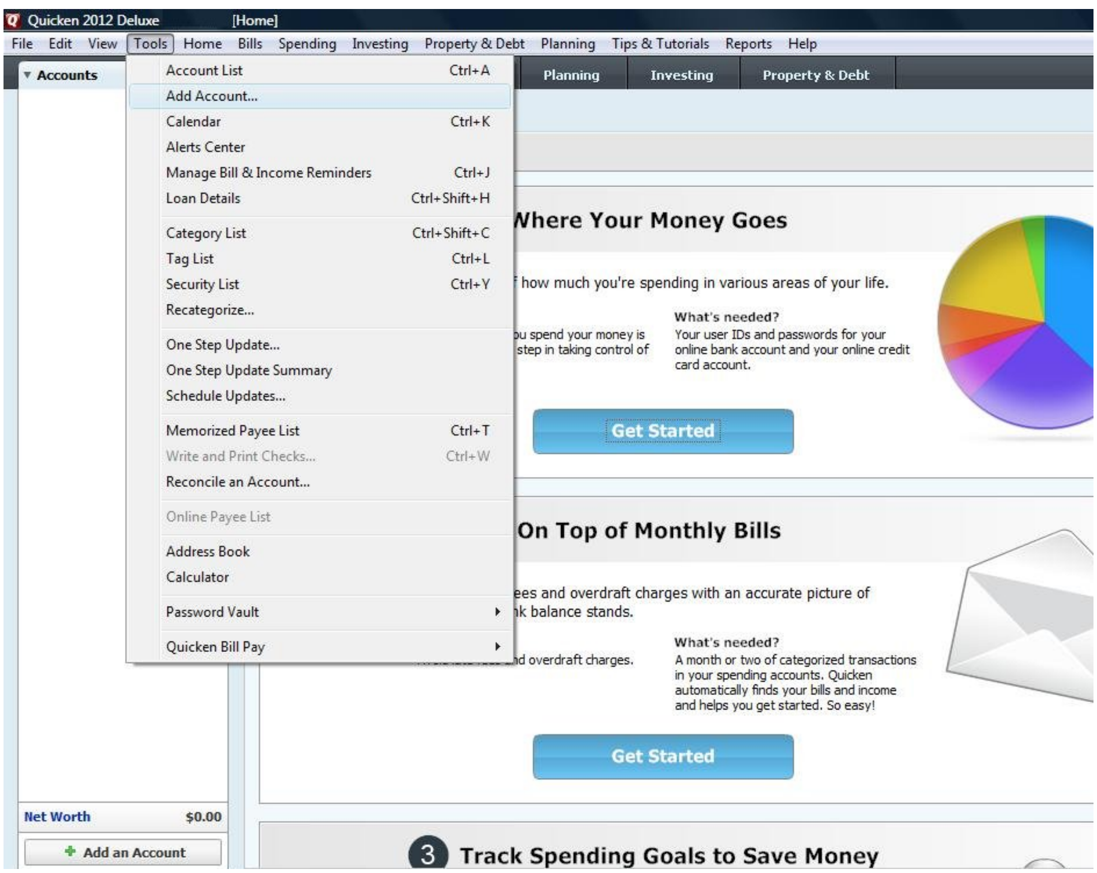
DOWNLOADING THE LATEST QUICKEN ® UPDATES

1. Click the update icon in the Account's section on the left hand side.
2. Uncheck all boxes → then click Update now in the One Step Update settings dialog.
3. If an update is available, Quicken will provide a description of the update and brief instructions for receiving the update.
4. When the update is completed, close Quicken. Then reopen Quicken.

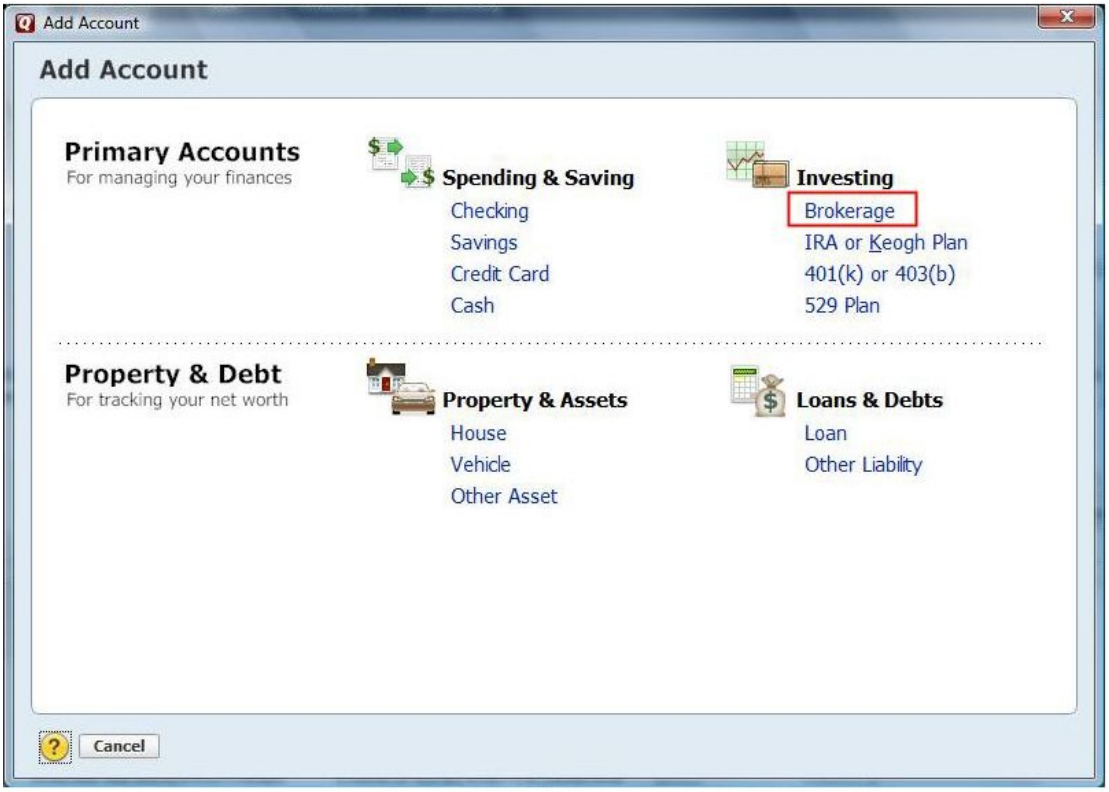
DOWNLOAD OPTION

CREATING A NEW QUICKEN ACCOUNT 2012

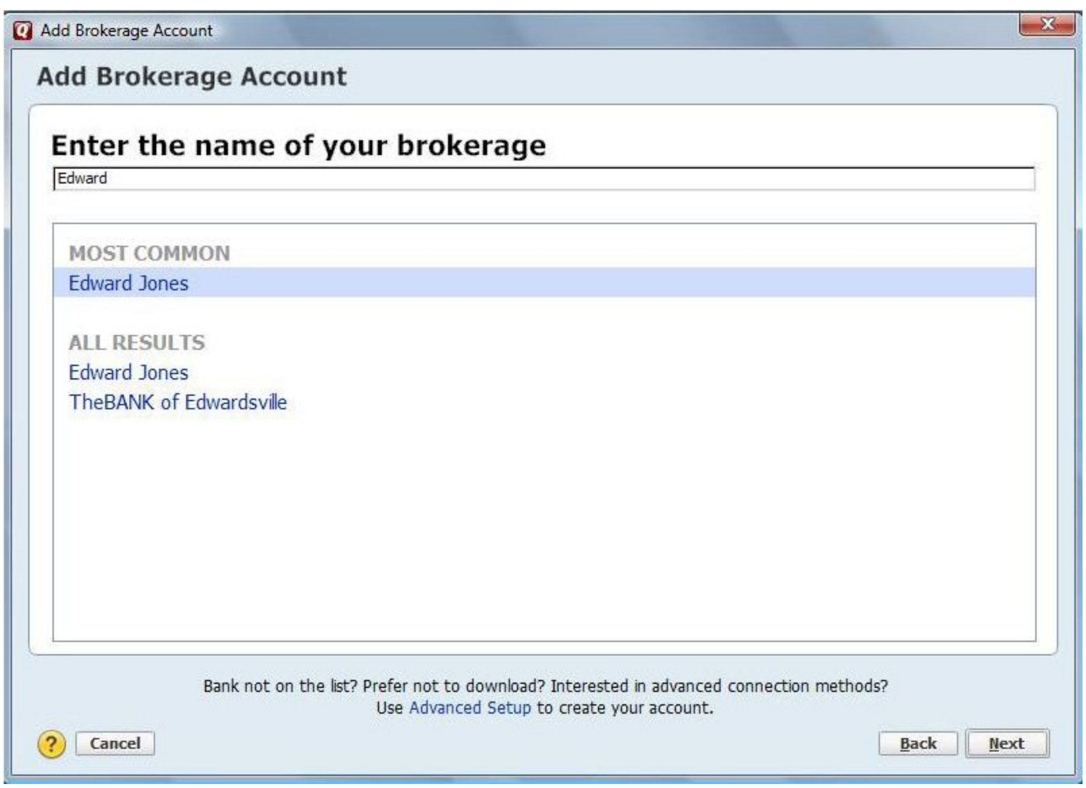
1. To add a new account launch Quicken 2012 → Click on **Tools** drop down menu → Then select the **Add Account** option.



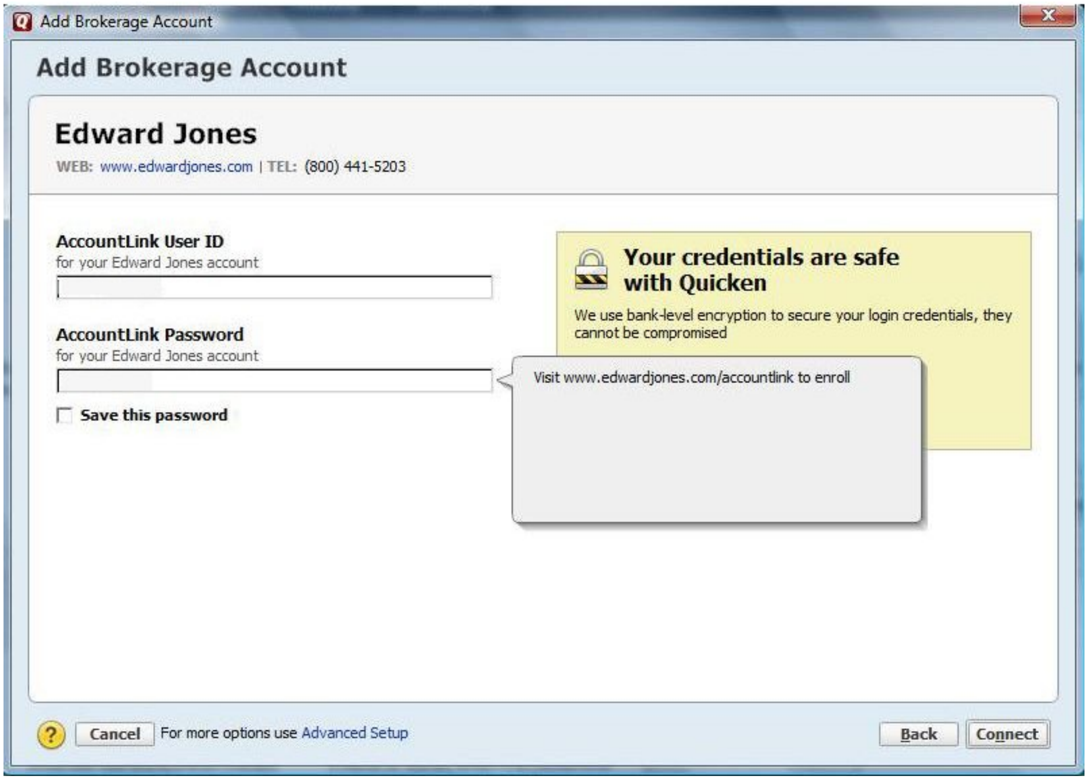
2. Select **Brokerage** under **Investing** in the Primary Accounts section



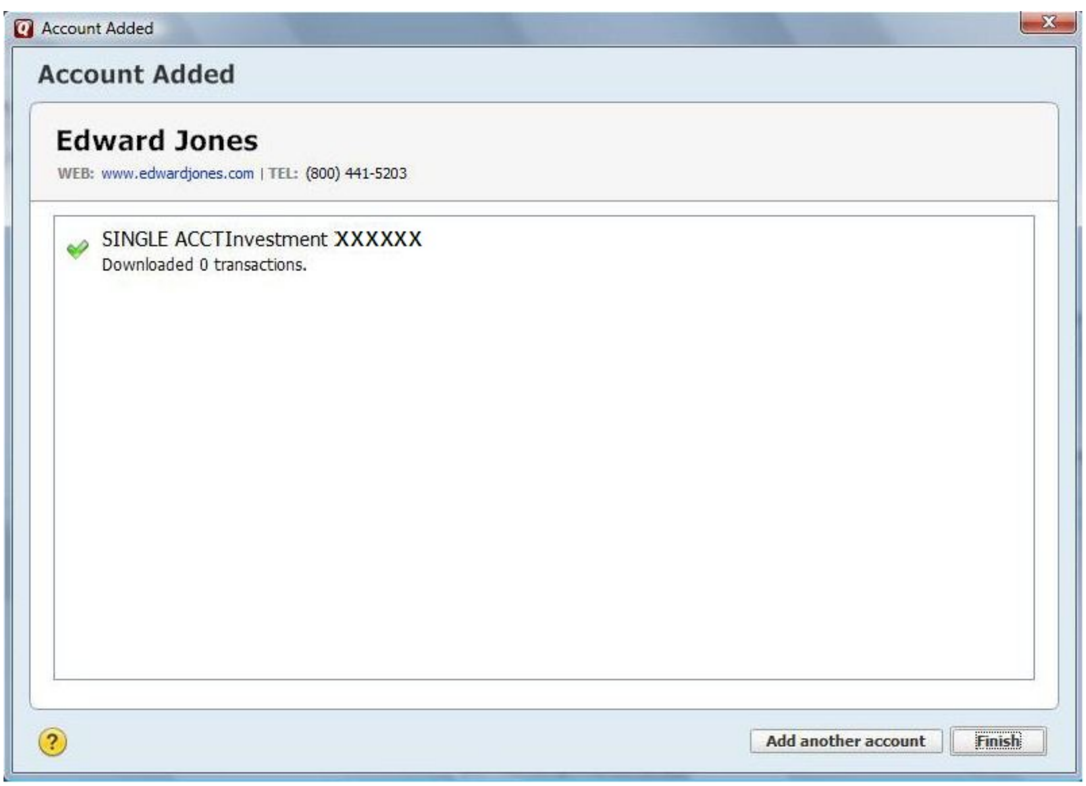
3. On the **Add Brokerage Account** screen enter **Edward Jones** → then click the **Next** button.



4. Enter your **Account Access (AccountLink) UserID** and **Password** ⟶ then click the **Connect** button.

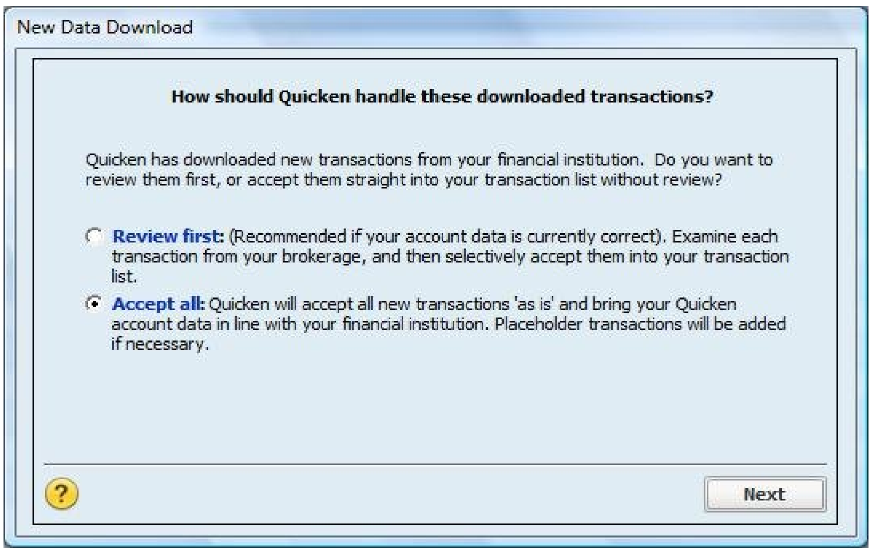


5. Quicken will now connect to Edward Jones and download the accounts. Once complete the **Account Added** page will appear ⟶ then click the **Finish** button.

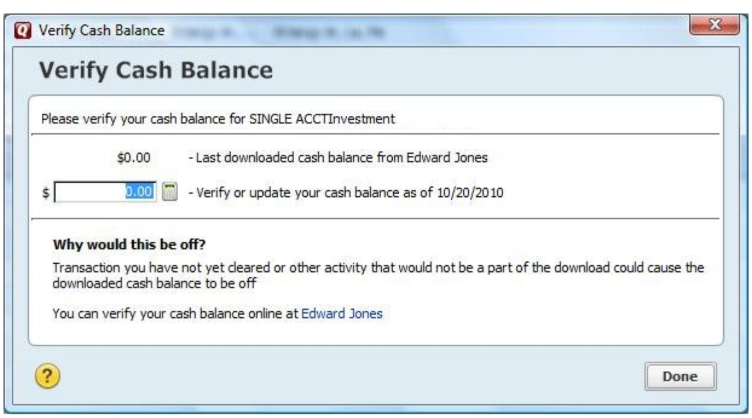


6. Click the account name in the **Accounts** section to finish downloading transactions. (You will have to click on each account to finish the process)

7. The **New Data Download** box will appear once you click on the account with the option to **Review** all downloaded transactions or to **Accept all** without review, once you select an option → then click the **Next** button.



8. When the **Cash Balance Adjustment** dialog displays, just click **Done**. If there is a cash balance, Edward Jones will send it. ***Important Note for Money Market Holders:** DO NOT enter your current money market balance as a cash balance. In doing so, you will overstate your account balance.



KEEPING YOUR QUICKEN ACCOUNT UP TO DATE

To update your accounts, just click the "Update" button located on the left hand side under "Accounts". Or you can click on **Tools** → then click **One Step Update**.

YOU ARE SET UP AND READY TO USE QUICKEN

If you would like assistance with downloading into Quicken, Please contact our Online Support Department at 1-800-441-5203.

Their hours are:
7:00 am - 9:00 pm CT Monday - Friday
8:00 am - 4:00 pm CT Saturday & Sunday