GETTING STARTED WITH QUICKEN®
2013 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 and your Account Access user ID and password.

This guide walks through setting up Quicken to import your Edward Jones accounts. The screens you see may vary slightly depending on your version of Quicken and the types of accounts you own.

Contained within this guide:

- **<u>Downloading the Latest Quicken Updates</u> –** How to download free product updates as they become available for your version of Quicken.
- **<u>Creating a New Quicken Account</u> –** How to create a new Quicken account for downloading transactions.
- **<u>Keeping Your Quicken Accounts Up to Date</u> –** 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, type in the topic and click Ask.
You can also visit Quicken's site for assistance: www.quicken.com/support

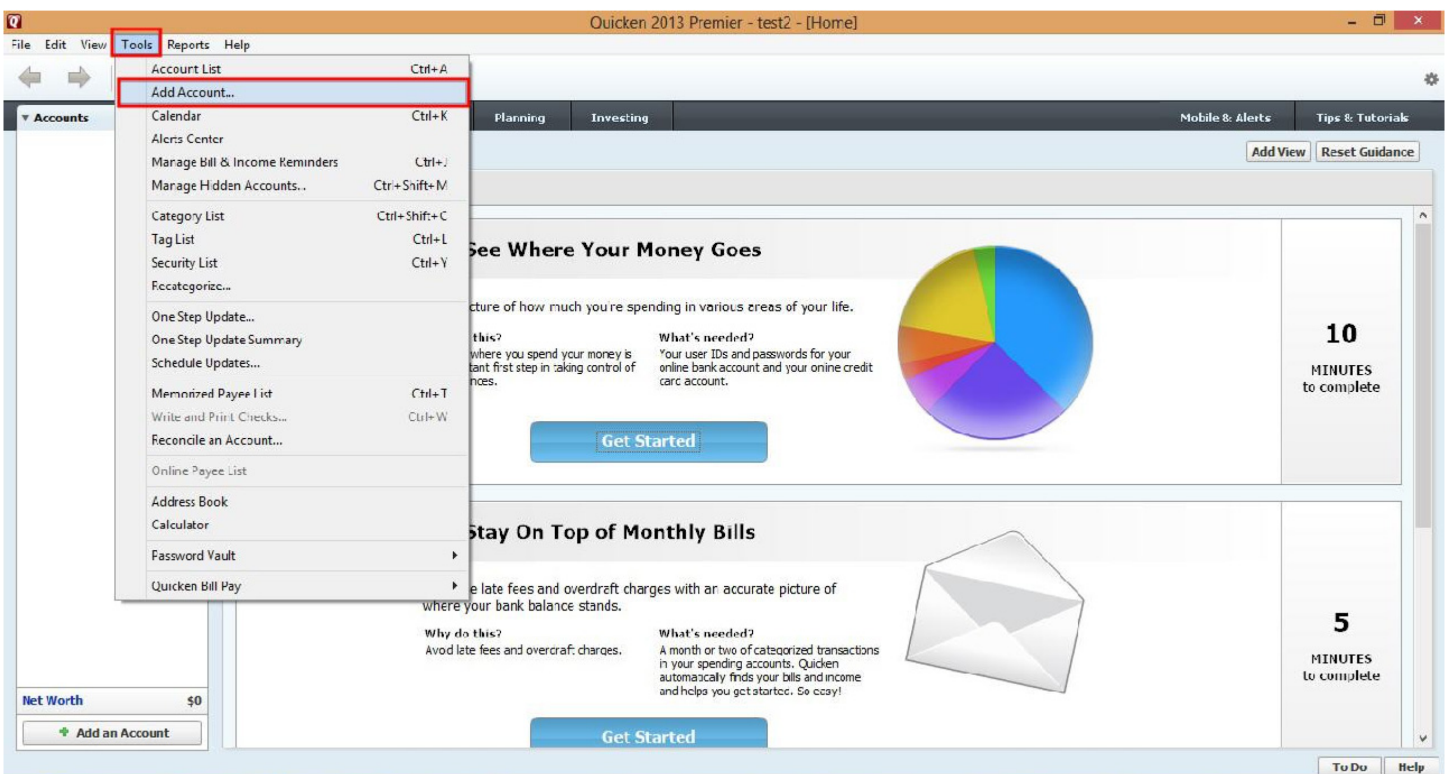
DOWNLOADING THE LATEST QUICKEN® UPDATES

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 and brief instructions for receiving the update.
4. When the update is complete, close and then reopen Quicken.

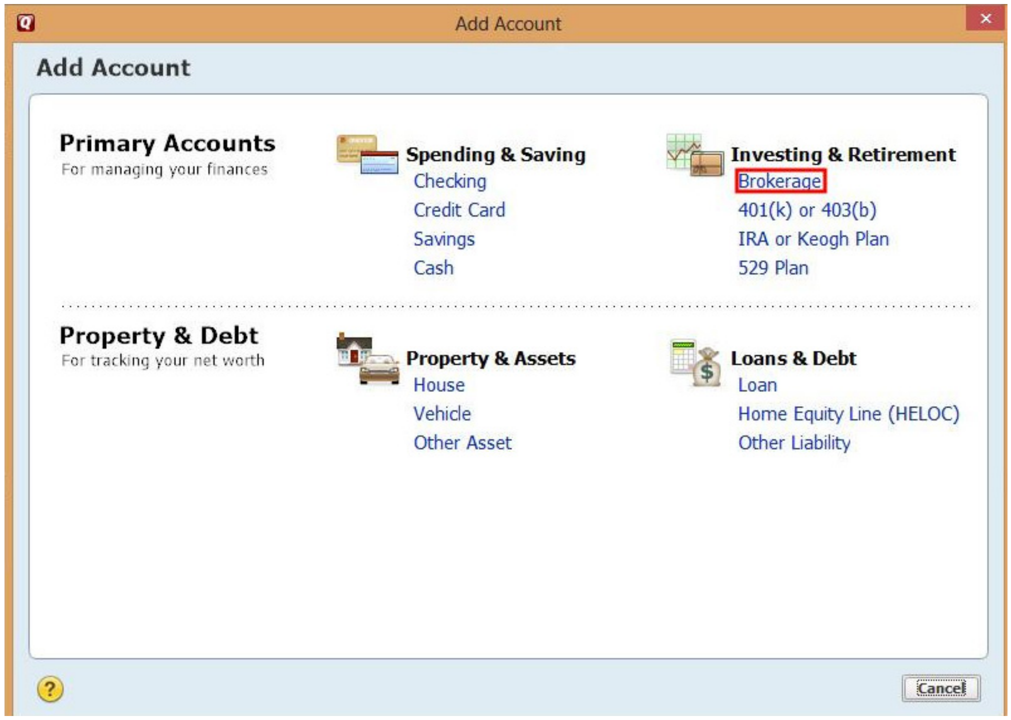
DOWNLOAD OPTION

CREATING A NEW QUICKEN ACCOUNT 2013

1. To add a new account, launch Quicken 2013 ⟶ Click on **Tools** drop-down menu ⟶ then select the **Add Account** option.

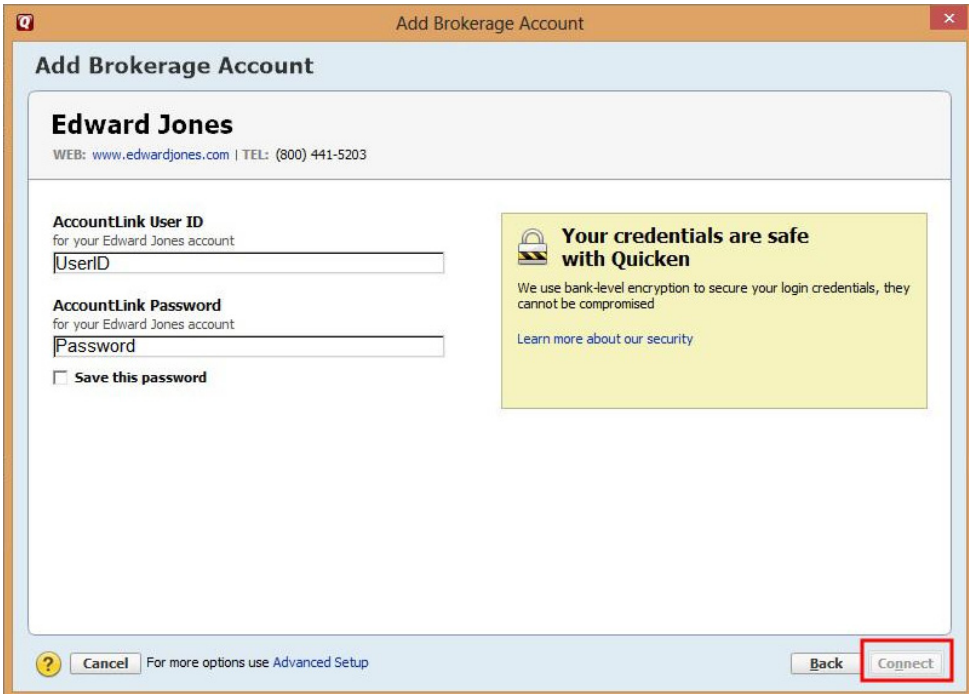


2. Select **Brokerage** under **Investing & Retirement** in the Primary Accounts section.

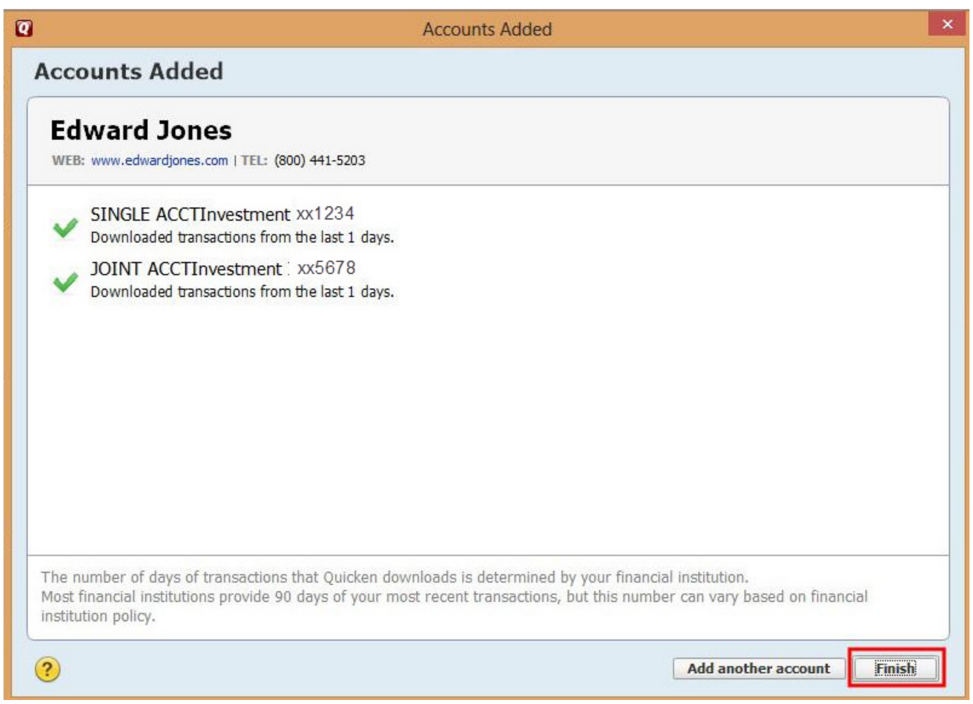


3. On the **Add Brokerage Account** screen, enter **Edward Jones** → then click the **Next** button.

4. Enter your **Account Access user ID** and **password** ⟶ then click the **Connect** button.

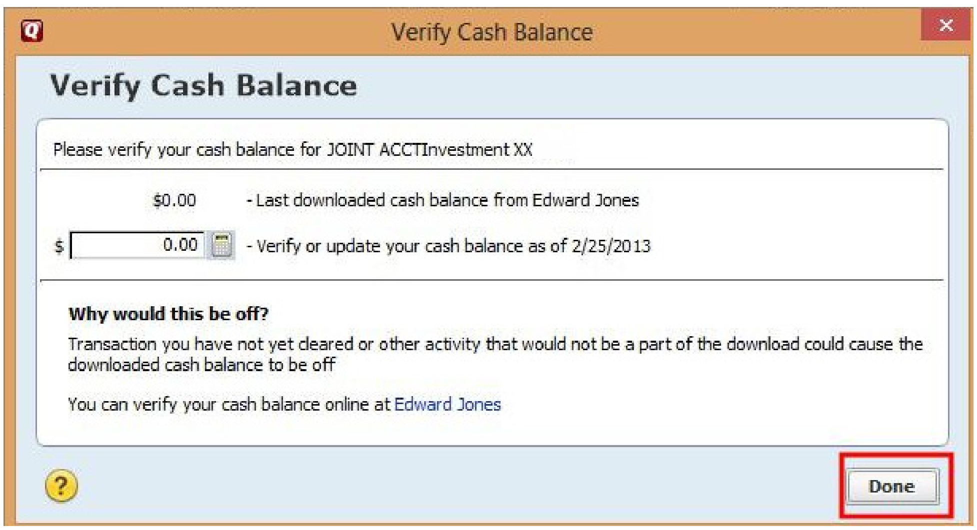


5. Quicken will connect to Edward Jones and download the account. When finished, the **Account Added** page will appear ⟶ then click the **Finish** button.



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

7. If you are asked to verify the Cash Balance (see below), 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 NOW SET UP AND READY TO USE QUICKEN

For assistance with downloading into Quicken, please contact our Online Support department at 800-441-5203.

7 a.m.–9 p.m. CT Monday–Friday
8 a.m.–4 p.m. CT Saturday and Sunday