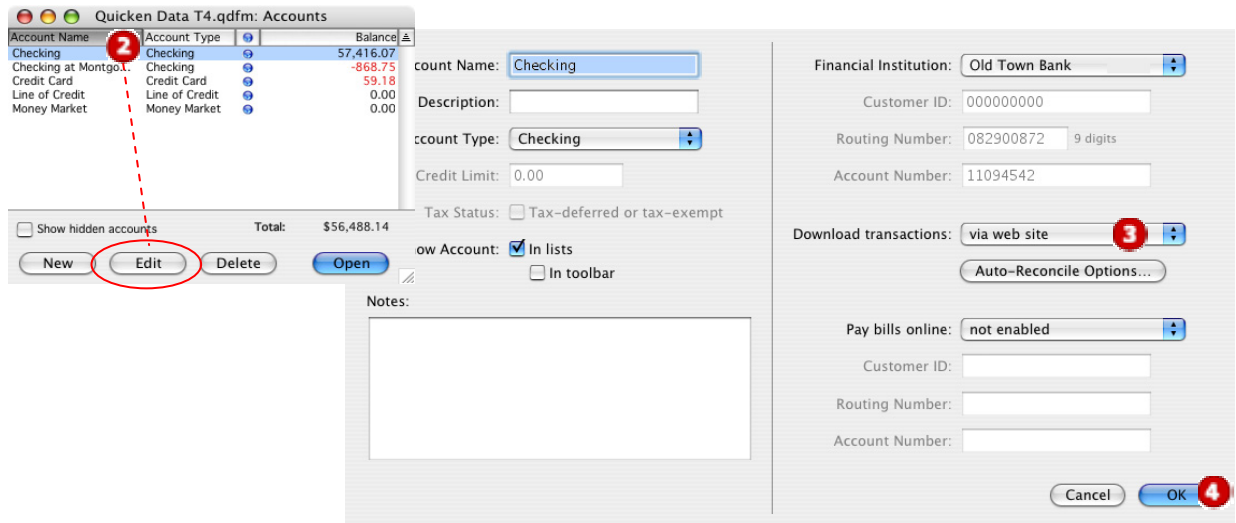


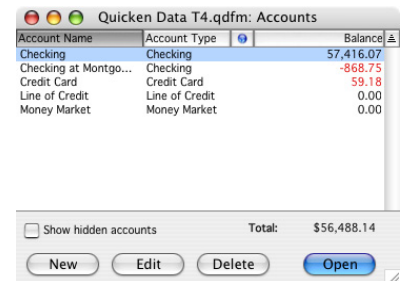
## DISABLE YOUR ACCOUNTS

1. Choose **Lists** menu → **Accounts**.



2. Select the account you want to disable, and click **Edit**.
3. In the **Download transactions:** drop-down list, select **not enabled**. Click **OK** to the prompt, “You are about to disable...”
4. Click **OK** to save your edits.

Repeat steps **2** through **4** for each [Financial Institution A] online account (such as checking, savings, credit cards, and brokerage). As each online account is disabled, its blue online circle icon disappears. Verify that your account list does not display blue online circle icons for any accounts at [Financial Institution A].



## ENABLE YOUR ACCOUNTS WITH [FINANCIAL INSTITUTION B]

**IMPORTANT:** Complete section **E** *on or after* the conversion.



**1.** Log in to your bank's Web site. Download your transactions into Quicken.

**Important:** To avoid the possibility of creating duplicate records when downloading into Quicken, select a "from" date that does not include records previously downloaded.

**2.** Click the **Use an existing Quicken account** radio button. In the corresponding drop-down list, select the Quicken account.

Select Account to Enable

You are downloading transactions for the following account:

Financial Institution: 1st National Bank & Trust  
Account Type: Checking  
Account Number: 11094542

Quicken does not have an associated account to handle these transactions. Select an existing account or enter a new account name, and click OK.

**2**  Use an existing account:

Create a new account:

Cancel OK

Select your existing account here.

Repeat steps **1** and **2** for each account that you will use for online banking or investing.