Steps to Download Account Transaction Information into Quicken

Workplace Retirement Plans

1. Log in with your User Name and Password.
2. Select **Account Access** or **Account Summary**.
3. Select **Access Retirement Account** from the **Account Summary** tab.
4. Select the **Transaction Summary** tab.
5. Select **+Show Filter** on the right side.
6. **Under Transaction History**, choose a time period or **Custom** to enter a specific date range* of transactions.
7. Select the **Retrieve Transactions** button and the available transactions will be displayed.
8. Select **Download History** on the bottom right side and select **Quicken OFX** from the drop-down menu.
9. Select **Open** when the **File Download** box appears.
10. Select an option to create new or link existing and select **Import**.
11. A summary of the account that was just updated will be displayed. Please close this box.
12. Quicken will ask to verify cash balance. Enter "0" for the dollar amount and select **Done**. This should complete your download.

*Date range is only available for the current year and the last two previous years.