

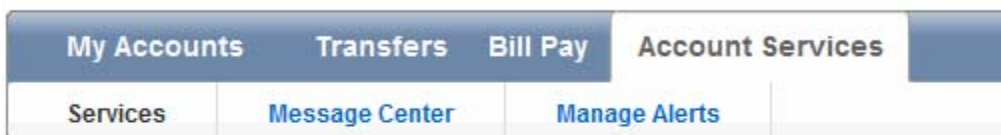
# IMPORTANT INSTRUCTIONS FOR QUICKEN USERS

## Quicken Essentials for MAC

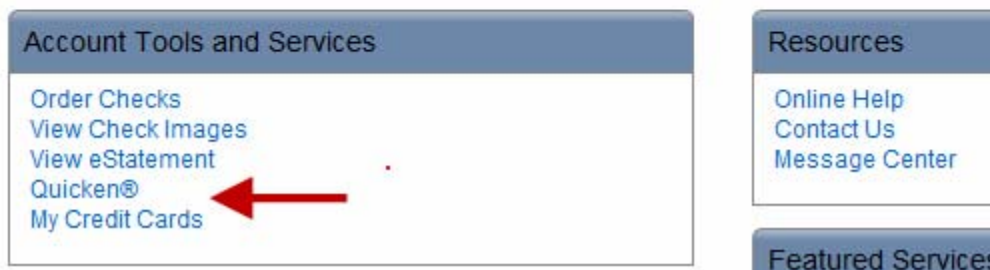
### STEP 1:

### Verify enrollment in Quicken services on PHFCUOnline

Login to PHFCUOnline and click Account Services. Under **Account Tools and Services**, click **Quicken**. (If you do not see Quicken, it means you are already enrolled. Proceed to Step 2.)



### Account Services



### STEP 2:

### Backup Your Current Data in Quicken

1. Open up Quicken and choose **File -> Back Up -> To Disk**
2. Specify the file and location of backup and click **Save**

### STEP 3:

### Download the Latest Quicken Software Update

1. Click the Quicken menu on the top tool bar and select **Check for Updates**
2. You will be prompted to download the update. Click **Install and Relaunch** to proceed.

## STEP 4: Get your latest transactions in Quicken

The Financial Institution name registered for Quicken has changed from "Pearl Harbor Federal Credit Union" to "Pearl Harbor Federal C.U" The following steps explain how to add the new name then link it to your existing PHFCU Quicken account(s).

1. Choose **Lists** menu -> **Accounts**
2. Select your PHFCU account and click **Edit**
3. In the **Download Transactions** dropdown list, select **not enabled**. Click **OK** to confirm.  
Repeat steps 2-3 for each PHFCU account in Quicken
4. Choose **Lists** menu -> **Accounts**. Select your PHFCU account and click **Edit**
5. Click the Financial Institution dropdown list and select **Change financial institution...**  
Select **"Pearl Harbor Federal C.U"** Click **Use**. Enter UserID and Password and click **OK**.
6. Complete the remaining prompts.
  - a. In the **Add Online Services** dialog box, match your first account to the appropriate account number. Click **OK**.
  - b. In the **Review Accounts** dialog box, match each account to the appropriate Quicken account by clicking **Select An Account...** under the **Store in the Quicken Account** column. Click **OK**.
7. Choose **Online** menu -> **Download Transactions...**
8. Select your account from the drop-down list and click **Download...**
9. Please verify transactions and delete any duplicates.

If you are still experiencing problems downloading your transactions, please contact us via Online Banking messaging or by phone 73-PHFCU. You can also obtain online and telephone assistance directly from Quicken at [quicken.com/support](http://quicken.com/support).