



Quicken® and Mint® Frequently Asked Questions

Refer to the Quicken and Mint Help. If you can't find your answer there, review this document.

Note: An answer may vary, depending on the version of Quicken you use.

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Account Setup

What's the difference between Quicken and Mint?

You purchase and install Quicken on your computer. You can access Quicken at www.quicken.com. You can access Mint at www.mint.com. Visit these two websites to view specific feature differences between the two products.

Which versions of Quicken can I use to download my savings plan?

Savings plan data can be downloaded using any version of Quicken For Windows or Quicken For Mac.

What financial institution do I choose when I download my savings plan information?

Use Alight Solutions as the financial institution for your plan.

Why am I seeing this window—Update 401(k)/403(b) Account: (your account name)?

Your financial institution information is out of date. Don't change or enter anything in the window—just close it. Run a One-Step Update for your Quicken software before you start to set up your account.

Here's how to run a One-Step Update:

1. Choose the Update icon at the upper left of your Quicken screen.
2. If any boxes are checked in the screen that appears, uncheck them.
3. Click the **Update Now** button. Quicken updates your financial institution information.
4. Close the window that appears after the update is complete.

Continue with your account setup. You'll know that your financial institution information has been updated successfully when you see the screen where Quicken prompts you for your Customer ID and PIN later in the setup process.

When setting up my account, how should I answer the following questions:

- Does your employer contribute to your 401(k)?
- Set up withdrawal from my paycheck for this account?
- Do you have any loans outstanding against this account?

Since all transaction detail is downloaded automatically, you can answer "No" or leave the box unchecked, if applicable.

I'm having trouble accessing my Quicken or Mint account. What am I doing wrong?

Be sure to enter the correct Customer ID and PIN. You can get both from the "Your Customer ID and PIN for Quicken and Mint" page on this site.

If you exceeded your maximum number of invalid entries, you may need to reset your PIN on this site before accessing Quicken and Mint.



If the Customer ID and PIN are correct and you continue to have difficulties, refer to Quicken Help at <https://www.quicken.com/support#windows> or <https://www.quicken.com/support#osx> or Mint Help at <https://www.mint.com/help/>.

I already manually track my savings plan information in Quicken. Will this download override the information I've already entered?

No, the download won't override any of your existing information.

You can:

- Delete the existing transactions and add the new transactions.
- Void or delete the transactions being downloaded before accepting them.
- Delete either the old or the new duplicate transactions.

How do I set up and download multiple plans?

One at a time. Set up a separate account for each plan.

When you set up your account, choose one plan from the list of accounts. Go through the setup process again and create a second account, choosing another plan from the list of accounts. Go through this process for each of your plans.

Downloading Plan Information

Why is it taking so long to download my plan information?

Your first download takes longer, since all of your plan information needs to be downloaded. Perform regular downloads quarterly (or more often) to reduce the time to download information. If you have more than 100 transactions per month, you should download at least once a month so that none of your data is left out.

Why can't I download my pension plan balances?

Quicken and Mint don't support pension plan balance downloads. Track your pension plan balances in Quicken and Mint by manually entering the data.

What happens if I download savings plan information while logged on to this site?

You'll automatically be logged off this site. To prevent this, log off from this site before you download savings plan information in Quicken or Mint.

If my plan has an outside brokerage window for my 401(k) plan, does the download feature include the brokerage account information?

Yes, the value of your brokerage window is included with the download of the other plan data. Because the 401(k) plan data doesn't include the individual securities, this information isn't included as part of the download. If you'll be downloading the security information directly from your brokerage account, you can delete the value of the brokerage window for your 401(k) plan within Quicken and Mint to avoid duplicate balances.



Transaction Detail

Why doesn't my savings plan balance in Quicken and Mint match my balance on this site?

The valuation date used by this site and Quicken or Mint may be different. Also, the fund prices in Quicken and Mint may not be updated for all funds. Refer to "[How are fund prices updated in Quicken?](#)" for more details. Your balance on this site will always govern.

What if the prices and shares for the downloaded transactions don't match the prices and shares on this site?

You might notice small differences because Quicken and Mint do their own rounding of the decimals. For example, Quicken might round a price of \$11.59 up to \$11.60.

Fund Information

How are fund prices updated in Quicken?

Fund prices are updated in Quicken when a transaction is posted for a fund. If there's no transaction for a fund and the account is updated in Quicken, only funds with a ticker symbol will have an updated price.

To find out if your fund has a ticker symbol, refer to the Investments page on this site. You can then manually add the ticker symbol in Quicken. If a ticker symbol is available for a fund, the price will also be updated when you download quotes from the Investing Center in your Quicken software.

What values do Quicken and Mint display for stock funds?

Quicken displays market value, unit shares, and a unit price. Mint displays market value.

Additional Help

If you need additional help using Quicken or Mint, visit:

- Quicken Technical Support at <https://www.quicken.com/support>
- Mint Help at <https://www.mint.com/help/>