Quicken Windows Conversion Instructions

Before the 1st Action Date: May 8th 2025

1. Back up your Quicken Windows Data File. Go to File > Backup and Restore > Backup Quicken File.
2. Download the latest Quicken Update. Go to Help > Check for Updates.
3. Complete a final transaction download. Accept all new transactions into the appropriate registers.

On or After the 2nd Action Date: May 13th 2025

1. Deactivate online banking connection for accounts connected to financial institution that is requesting this change.

a. Choose Tools > Account List.
b. Click Edit on the account to deactivate.
c. In Account Details, click Online Services.
d. Click Deactivate. Follow prompts to confirm deactivation.
e. Click the General tab.
f. Delete Financial Institution and Account Number information.
g. Click OK to close window.
h. Repeat steps for any additional accounts that apply

Reconnect the online banking connection for your accounts

a) Download a Quicken Web Connect file from your financial institution's online banking site.
b) In Quicken, choose File > File Import > Web Connect (.QFX) File.
c) Use the import dialog to select the Web Connect file you downloaded. An "Import Downloaded Transactions" window opens.
d) Choose Link to an existing account. Select the matching account in the drop-down menu. Associate the imported transactions to the correct account listed in Quicken.
e) Repeat this step for each account you have connected to this institution.