Quicken® & QuickBooks® Export

Quicken & QuickBooks Export in Personal Branch

The following are instructions on how to export your history into the Quicken & QuickBooks Software. Per Intuit, Online Banking Transaction Downloads into either Quicken or QuickBooks is available in the latest version of Quicken & QuickBooks, plus the two prior versions. *Complete information about Quicken and QuickBooks discontinuation policy is available from their website:*

- http: //quicken.intuit.com/support/
- http: //support.quickbooks.intuit.com/support/

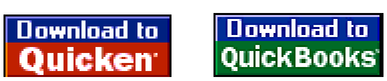
Currently you are not able to import your transactions into Quicken or QuickBooks using the **One Step WebConnect Update** feature. We do not allow Quicken (or Mint.com, an Intuit affiliate) to connect directly to your Westmark Account to retrieve transactions. However you can still utilize Quicken and QuickBooks using the Export function.

In order to update your account transactions you must log into Personal Branch and export the data into Quicken or QuickBooks.

Please follow these instructions to export data into Quicken and QuickBooks

1. Log onto Personal Branch and click on the account you want to export data from, which will pull your history.
2. On the top banner, click on the "**Export**" link

3. Click the "**More**" button at the bottom of the page until you have all the history you need to Export
4. Check mark ☑ the data you wish to export.
5. Click on the "**Download to Quicken**" or "**Download to QuickBooks**" button, depending on the program you are exporting to.



***Please note**: If Quicken or QuickBooks is not already open on your desktop, by clicking on the "**Download**" button the application should automatically open. If it does not launch and gives you a choice to "**open or save**" click **Open** and the application will launch.*

If you currently have accounts listed in Quicken or QuickBooks, and after exporting the data you get a message to "create a new account" during the import, please follow the below instructions:

1. Go to Quicken or QuickBooks
2. On the left column, right click on the Account
3. Click on "**Edit Account**" option
4. In the Account Number field you will need to take out the dash and put in the equals sign. For example: ***12345=01***
5. Click on OK
6. Go back to Personal Branch and export the data into Quicken or QuickBooks