Quicken® Personal Finance Software 2007 for Windows®
CitiStreet Account Conversion Instructions

As CitiStreet completes its system conversion to MetLife Retirement, you will need to modify your Quicken settings to ensure the smooth transition of your data. You will need your customer ID and password for CitiStreet and MetLife Retirement. **This update is time sensitive and must be completed between November 24, 2006 and December 24, 2006.**

It is important that you perform the following instructions exactly as described and in the order presented. If you do not, your online investing service may stop functioning properly. This conversion should take about 15 minutes.

Note: In the following screen shots, red icon numbers match step number instructions. All financial institution and register information is fictitious and for illustration only.

Throughout this guide, this symbol displays to indicate that there are optional FAQs.

A. BACK UP YOUR CURRENT DATA

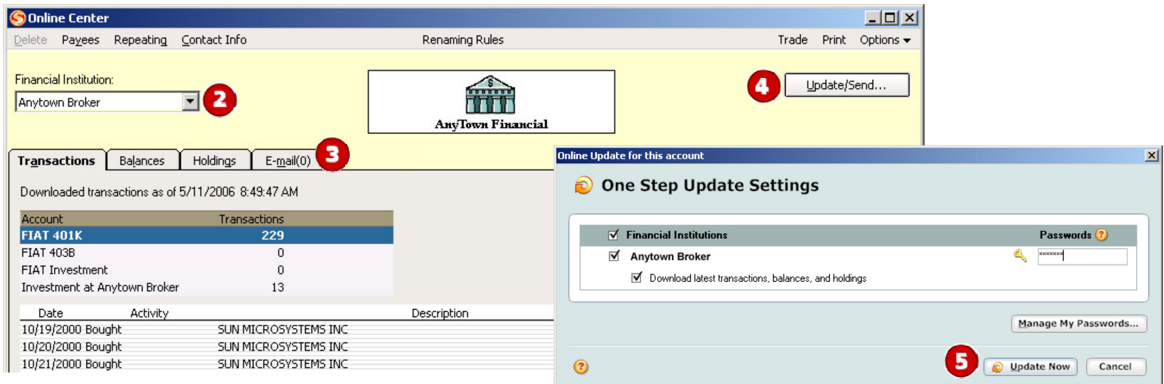
1. Choose **File** menu → **Backup**.
2. Specify which file to back up and where you want the backup saved in the **Quicken Backup** dialog, and then click **OK**.

B. DOWNLOAD THE LATEST QUICKEN UPDATE

1. Choose **Online** menu → **One Step Update**.
2. In the **One Step Update Settings** dialog, uncheck any boxes, and then click **Update Now**.
3. If a software update is available, then you will be prompted to apply it now.
4. Once the update is complete, restart Quicken.

C. GET YOUR LATEST TRANSACTIONS FROM CitiStreet

1. Choose **Online** menu → **Online Center**.



2. Select CitiStreet from the **Financial Institution** drop-down list.

3. Click the **E-mail** tab to read and print each e-mail as necessary, and then delete each one.

4. Click **Update/Send**.

5. In the **Online Update for this account** dialog, make sure that all items are checked. Enter your CitiStreet password, and then click **Update Now**.

6. If new transactions display in the **Online Update Summary** window, then go to the investment account, click the **Transactions** tab, and accept the transactions.

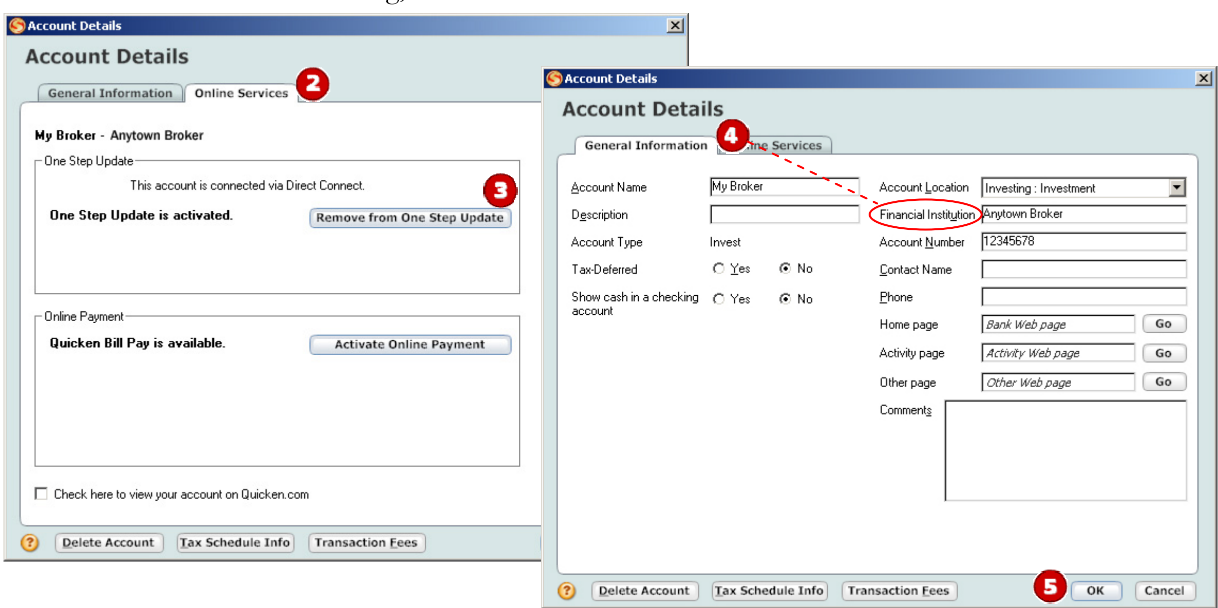
   - For help accepting transactions, choose **Help** menu → **Quicken Help**. In the **Type in the word(s) to search for:** prompt, enter **Accept downloaded transactions**.

   - For assistance reconciling your account register, choose **Help** menu → **Quicken Help**. In the **Type in the word(s) to search for:** prompt, enter **Reconciling investment accounts**.

D. DEACTIVATE YOUR ACCOUNTS WITH CitiStreet

1. Right-click your first CitiStreet account from the list of accounts under **Investing Center**, and select **Edit account** from the drop-down list.

2. In the **Account Details** dialog, click the **Online Services** tab.



3. Click **Remove from One Step Update** in the **One Step Update** area. Confirm the remaining prompts.

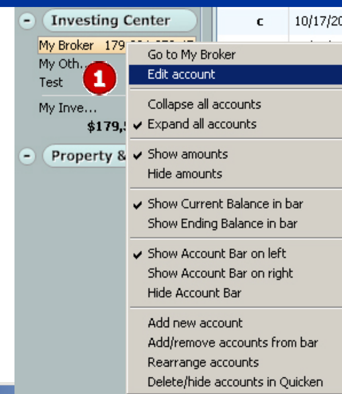
4. Click the **General Information** tab. In the **Financial Institution** field, type MetLife Retirement.

5. Click **OK** to close the **Account Details** dialog.

Repeat steps **1** through **5** for each additional online account.

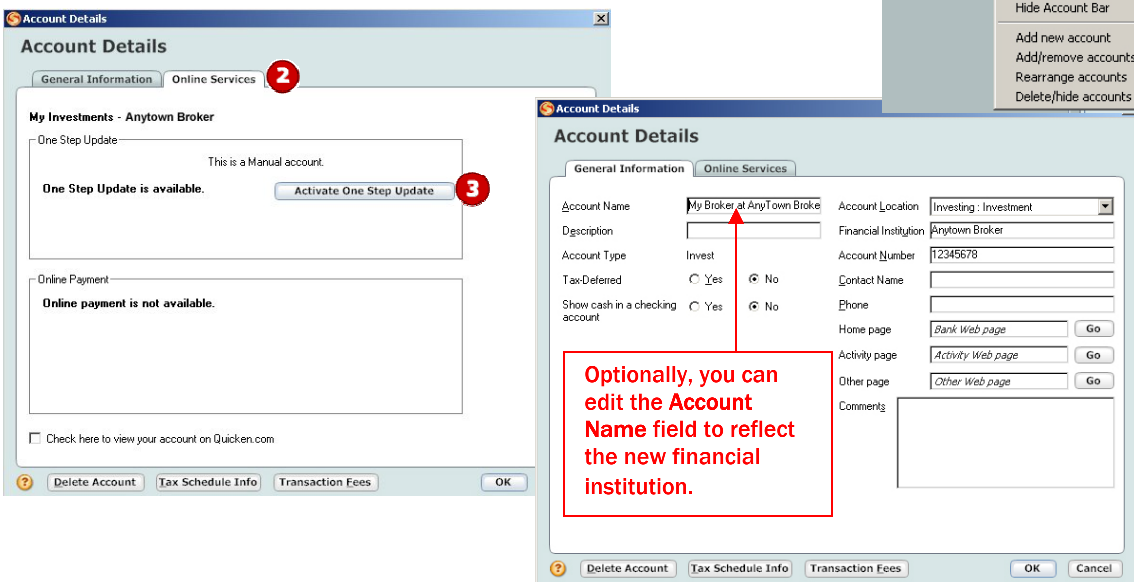
NOTE: You do not need to repeat these steps additionally for a linked cash account. Complete deactivation for all accounts at this financial institution other than a linked cash account.

E. ACTIVATE YOUR ACCOUNTS WITH MetLife Retirement



IMPORTANT: Complete section **E** *on or after* November 24, 2006.

1. Right-click your retirement account(s) from the list of accounts under **Investing Center**, and select **Edit account** from the drop-down list.
2. Click the **Online Services** tab.



3. Click **Activate One Step Update** in the **One Step Update** area.
4. Follow the on-screen instructions, and enter the customer ID and password. If you have more than one account, then match each Quicken account to the appropriate MetLife Retirement account in the drop-down list, and complete the remaining prompts.

If you have more than six accounts, repeat steps **1** through **4** for each additional set of six (or less) accounts that you use with online services.

NOTE: You do not need to repeat these steps for a linked cash account. Complete activation for all accounts at this financial institution other than a linked cash account.

⚠ If you use the Password Vault, be sure to update it with your new MetLife Retirement password. See *Update your PIN Vault* at http://www.quicken.com/conversionfaqs.

⚠ To verify that all your online accounts have been reactivated, see *Account List Maintenance* at http://www.quicken.com/conversionfaqs.

THANK YOU FOR MAKING THESE IMPORTANT CHANGES!

If you have any questions regarding these instructions, then click http://www.quicken.com/conversionfaqs to access **Quicken FAQs for Financial Institution Conversion Customers.**

You may also contact us at 877-948-4638. A customer service representative will be available to assist you 24 hours, 7 days a week. You may also visit the MetLife Retirement Web site at www.metlife.com or refer to: http://www.intuit.com/support/quicken.