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



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**.



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.



GET YOUR LATEST TRANSACTIONS FROM CitiStreet

1. Choose **Online** menu \rightarrow **Online Center**.

Sonline Center			
Delete Payees Repeating Contact Info	Renaming Rules	Trade Print Options 🕶	
Financial Institution: Anytown Broker	AnyTown Financial	4 Update/Send	
Transactions Balances Holdings E-mail(0)		Online Update for this account	×
Downloaded transactions as of 5/11/2006 8:49:47 AM		💫 One Step Update Settings	
Account Transactions			
FIAT 401K 229		 Financial Institutions 	Passwords 😗
FIAT 403B 0		✓ Anytown Broker	4
FIAT Investment 0		Download latest transactions, balances, and holdings	
Investment at Anytown Broker 13			
Date Activity 10/19/2000 Bought SUN MICROSYSTEMS INC 10/2000 Bought SUN MICROSYSTEMS INC	Description		Manage My Passwords
10/21/2000 Bought SUN MICROSYSTEMS INC		0	5 © Update Now Cancel

- 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.



 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.

S Account Details	×				
Account Details					
General Information Online Services	S Account Details				×
My Broker - Anytown Broker	General Information	ils the Services			
This account is connected via Direct Connect.	Account Name	My Broker	Account Location	Investing : Investment	-
One Step Update is activated. Remove from One Step Update	Description		Financial Institution	Anytown Broker	
	Account Type	Invest	Account Number	12345678	
	Tax-Deferred	C ⊻es ⊙ No	Contact Name		
Defec Demonst	Show cash in a checking account	C Yes 💿 No	<u>P</u> hone		
Unline Payment			Home page	Bank Web page	Go
Activate Unine Payment			Activity page	Activity Web page	Go
			Other page	Other Web page	Go
			Comments		
Check here to view your account on Quicken.com					
Delete Account [Iax Schedule Info] [Transaction Eees]	-				
	Delete Account	Tax Schedule Info	Transaction Eees	Бок	Cancel

- **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.

ACTIVATE YOUR ACCOUNTS WITH MetLife Retirement

Investing Center

1

My Broker 179

My Oth.

My Inve.

Test

10/17/200

c

Go to My Broker

Collapse all accounts

 Show Current Balance in bar Show Ending Balance in bar

Show Account Bar on left

Edit account

\$179.: V Expand all accounts

Property & Show amounts Hide amounts

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

- 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.

Ε.

🕞 Account Details	Hide Account Bar
Account Details General Information Online Services 2	Add new account Add/remove accounts from bar Rearrange accounts Delete/hide accounts in Quicken
My Investments - Anytown Broker	S Account Details
One Step Update	Account Details
This is a Manual account.	General Information Online Services
One Step Update is available. Activate One Step Update	Account Name My Broker at AnyTown Broke Account Location Investing : Investment
	Description Financial Institution Anytown Broker
	Account Type Invest Account Number 12345678
Online Payment	TaxDeferred O Yes O No Contact Name
Online payment is not available.	Show cash in a checking C Yes O No Phone
	Account Home page Bank Web page Go
	Activity page Activity Web page Go
	Optionally, you can Other page Go
	edit the Account
Check here to view your account on Duicken com	Name field to reflect
	the new financial
Delete Account Tax Schedule Info Transaction Eees OK	institution.
	Delete Account Tax Schedule Info Transaction Eees OK Cancel

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

THANK YOU FOR MAKING THESE IMPORTANT CHANGES!

If you have any questions regarding these instructions, then click <u>http://www.quicken.com/conversionfaqs</u> 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 <u>www.metlife.com</u> or refer to: <u>http://www.intuit.com/support/quicken</u>.