Quicken® Personal Finance Software 2007-2010 for Windows®
Baker Boyer Bank Account Conversion Instructions

As Baker Boyer completes its system conversion, you will need to modify your Quicken settings to ensure the smooth transition of your data. You will need to be able to log in to www.bakerboyer.com. **This update is time sensitive and must be completed by March 9th, 2010.**

It is important that you perform the following instructions exactly as described and in the order presented. If you do not, your online service may stop functioning properly. This conversion should take 10 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.

⚠ Within 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 that are checked, 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 BAKER BOYER NATIONAL BANK

Download to Quicken

1. Log in to Baker Boyer's Online Banking Web site. Download your transactions through March 9th, 2010 into Quicken.

Note: You will not be able to download these transactions after March 9th.

Repeat this step for each account (such as checking, savings, credit cards, and brokerage) that you use for online banking or investing.

2. Once the transactions are downloaded, **accept all the transactions into your Quicken account register.**

Important: You will not be able to proceed to the next section until you accept all transactions in the **Downloaded Transactions** tab.

- 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 an account**.

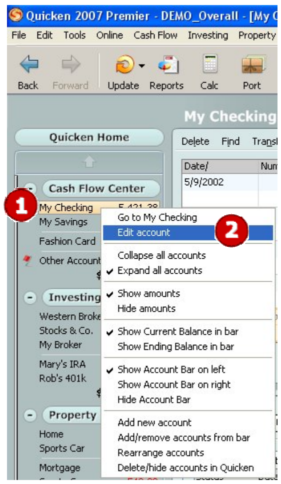
D. DEACTIVATE YOUR ACCOUNTS WITH BAKER BOYER NATIONAL BANK

1. *Quicken banking customers:* right-click your first Baker Boyer account from the list under Cash Flow Center.

   Quicken investing customers: right-click your first Baker Boyer account in the Investing Center.

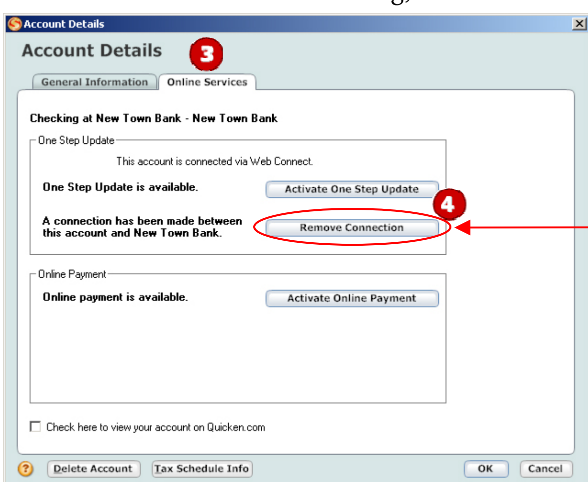
2. Select **Edit account** from the pop-up menu. **Edit account number, etc. as needed.**

Banking Customers



Investing Customers

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



This button varies:

- If you manually download transactions, this button displays as Remove Connection.
- If you use One Step Update to automate downloading your transactions, this button displays as Remove from One Step Update.

4. Click **Remove Connection** or **Remove from One Step Update** in the One Step Update area. Confirm the remaining prompts.

5. Click the **General Information** tab. In the Financial Institution field, type Baker Boyer Bank. Optionally, edit the Account Name field to reflect the new financial institution.

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

Repeat steps **1** through **6** for each Baker Boyer account from which you download transactions.

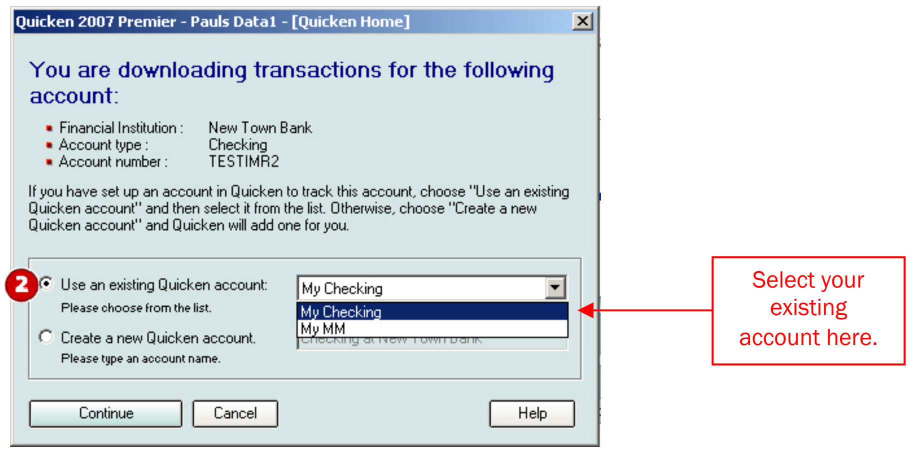
E. ACTIVATE YOUR ACCOUNTS WITH BAKER BOYER BANK

IMPORTANT: Complete section **E** *on or after* March 12th, 2010.

1. Anytime on or after March 12th, open a Web browser and log in to Baker Boyer's Online Banking at www.bakerboyer.com. Download your transactions into Quicken.

Important: To avoid the possibility of creating duplicate records when downloading into Quicken, select a "from" date that does not include records previously downloaded from Baker Boyer Bank.

2. Click the **Use an existing Quicken account** radio button. In the corresponding drop-down list, select the Quicken account that you used for Baker Boyer Bank.



Repeat steps **1** and **2** for each account that you will use for online banking or investing with Baker Boyer Bank.

F. AUTOMATING YOUR WEB CONNECT DOWNLOADS [OPTIONAL]

Express Web Connect provides the option of activating the One Step Update feature, which automates the downloading of Web Connect data. To activate the One Step Update feature, take either of these actions:

- If you see the Activate One Step Update prompt during the Web Connect download process, click **Yes**, and then click **Activate**.
- From Quicken, choose **Online** menu → **One Step Update**. In the dialog that displays, choose **Activate One Step Update** link next to **Baker Boyer Bank**. Once activated, you can choose **Online** menu → **One Step Update** to perform downloads.