

Retirement Plan Enhancement

Quicken – Now Available through the Retirement Directions Website

Good News!

Vested Interest® is pleased to announce that you now have access to be able to download transactions into Quicken® 2013 through the Retirement Directions Website. This enhanced feature allows you to securely download and track your account balances and transaction history directly to Quicken from your retirement plan account.

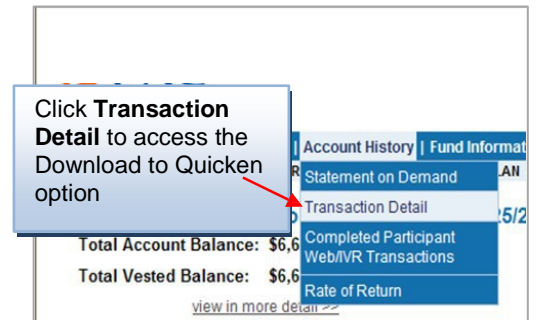
Download Balance History and Transactions to Quicken

Start by logging into your account at www.retirementdirections.com. On the Home page click on “Transaction Detail” from the Account History tab. From here you will be prompted to download your transaction history to Quicken in three easy steps:

- ✓ Step 1 - Download a balance spreadsheet
- ✓ Step 2 - Create a balance file to download balances into Quicken
- ✓ Step 3 - Create a transaction file to download into Quicken

It's that simple. Return to the “Transaction Detail” from the Account History tab anytime you would like to download transactions and balances from your retirement account to Quicken.

For a complete set of step-by-step directions on how to set up Quicken for your retirement account, a Quicken User Guide is available in the Bulletin section of the Education Center.



Who to Contact With Questions

If you have any questions related to how to use Quicken, you can access the Quicken Support link on www.quicken.intuit.com/support/.

Quicken Support Link



If you have any questions about your account on the Retirement Directions website, please contact the Vested Interest Customer Service Representative. Thank You!



ONLINE

Visit retirementdirections.com to learn more or receive assistance.



MOBILE

Download **Retirement Directions** from the App Store from your smartphone or smart device.



TELEPHONE

Call **1-800-374-4631** from 8 am–10 pm, ET, Monday–Friday to speak with a Participant Services representative.

Newport Group and its affiliates do not provide tax, legal or accounting advice. You should consult your own tax, legal and accounting advisors before making any decisions.

“Vested Interest” is a registered service mark of Newport Group, Inc.

© Newport Group, Inc. 2019. All rights reserved.

