

# Linking your retirement account to Quicken®

You can now download your ABA Retirement Funds account information to the popular personal financial management software package – Quicken®. At your command, an automated link feeds current, accurate data – including balances and transactions – to Quicken<sup>1</sup>. With this time saving capability, you can plan and make decisions viewing all your investment information at once.

To download plan account information to Quicken, follow the steps below. If you have questions about setup procedures, you can use the program's Help feature.

## Step 1 – Add New Account (Voya Institutional Plan Services)

- Begin at the Quicken start-up screen on your desktop and click on **Investing**, then **Investing Accounts** then **Add Account**.
- At the prompts, select 401(k) and 403(b) retirement plans from the list, then Voya Institutional Plan Services.
- Enter your choice for a name for your plan account.
- Click on the setup method you want to use – **Online (recommended)** or **Manual**. To keep going, click **Next**.

## Step 2 – Identify Yourself

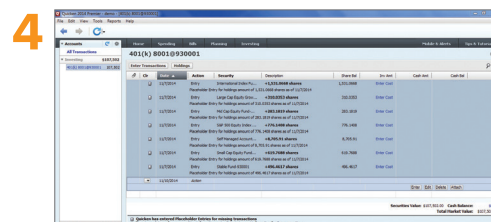
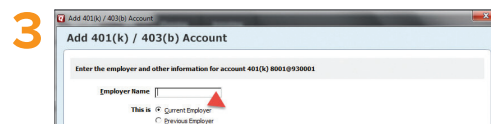
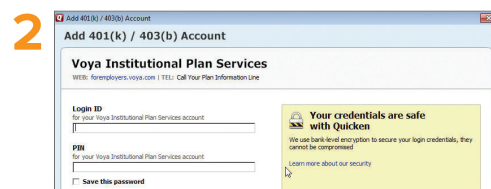
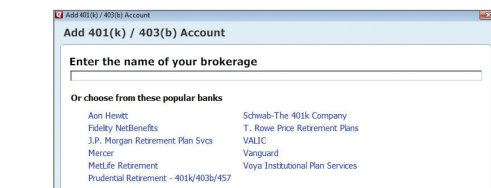
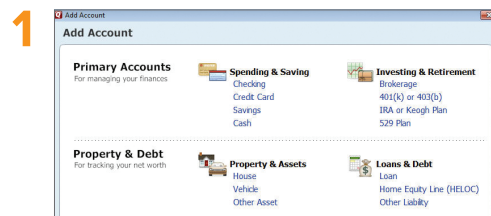
- Enter your **Username** or **Social Security** number@abaprogram, for example, 123456789@abaprogram.
  - Enter the same **Password**<sup>2</sup> you use to access your retirement account online.
- To keep going, click **Next**.

## Step 3 – Select Plan Accounts

- Click on the **name** of the first plan account you want to download. To keep going, click **Next**.
- Click on the **names** of additional plan accounts to download. Enter your choice for a name for each additional plan account. To keep going, click **Next**.
- The screen displays your **account set-up**. To confirm the information, click **Next**.

## Step 4 – Download Complete

- The program downloads and registers the information from your plan account(s) and displays it.
- Next time you use the program, you can update your plan account information with the latest transactions and balances – with a single click of the mouse.



To learn more about this and other financial topics, access your plan today.

<sup>1</sup> If you don't already have Quicken® on your computer, you can go to <http://www.intuit.com/> to purchase and download the software.

<sup>2</sup> If you forgot your Password, visit [www.abaretirement.com](http://www.abaretirement.com) and access the participant website. On the Login page, click on the link that says "Forgot your Password."