



By [Ryan Guina](#) · August 25, 2020

# How to Download TSP into Quicken

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Can You Download TSP into Quicken The Thrift Savings Plan (TSP), the government version of a 401k, does not currently offer its members the option of downloading their information directly into Quicken. Why not? Mostly, it's a cost issue. Quicken charges financial institutions a lot of money to make their software compatible and downloadable. In the TSP...



## **Can You Download TSP into Quicken**

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In the [TSP FAQ's](#), Number 4, the question is asked:

**Q:** "Can I download the financial data from my participant statement into financial spreadsheet programs such as Quicken?"

**A:** "We have looked into the feasibility of providing procedures for downloading a participant's TSP financial data into a program such as Quicken. However, we discovered that the cost would be too high to make it worthwhile, and, more importantly, the procedures that the software manufacturer has developed to transfer data from your [account](#) to its program are user-unfriendly and extremely hard to follow. We have therefore decided not to implement such procedures at this time. We will revisit this issue periodically to see if the situation has improved."

**Now, I would like to dissect their answer. Basically, they said cost and a user-unfriendly interface. (User-unfriendly? I think the government made up another word!)**

**Cost:** TSP costs are very low and I would hate to see a substantial increase. But think about the investments the TSP offers. It has several funds that track major indexes. Is it really that expensive to manage index funds? I'm sure there are a lot of ways that TSP officials can add Quicken compatibility, cut costs in other areas, and still charge very low fees. How about not sending out paper statements at all, unless specifically requested? I'm sure there are many other cost effective measures that can be made.

**Difficult to Use:** As far as their comments about Quicken being 'user-unfriendly', I use Quicken, and have had no troubles downloading financial data from any of my financial institutions. It is possible TSP officials originally answered this question several years ago, before many people had experience using spreadsheets on a regular basis, and decided it was easier to leave things in the status quo.

**Will it change?** I hope so! I know many people who would love to be able to more accurately track their TSP investments. I have read numerous posts on forums asking about the Quicken issues. I have even submitted a question about it to the TSP, but TSP workers do not answer individual questions/comments due to the sheer numbers of plan participants (over 3.4 million according to the TSP website). Perhaps if enough people started complaining or asking about it, things may change. But maybe not.

So, as of now, there is no direct way to download the Thrift Savings Plan into Quicken from the TSP website, but, there is a work around. These instructions are from Allen at Middleriver.net (site no longer available). (Read the Thrift Savings Plan's reasons why you cannot download the TSP into Quicken from the TSP site.)

You can manually input the data line by line, or you can import all of the data at one time (recommended!). Here is how to do the work around and import the TSP data into Quicken:

## How to Download TSP into Quicken

1. Open Quicken and create a new investment. Here is how to create a new file in Quicken.
2. Open "Investment Center" located in left tool bar. This displays each of your investment and accounts.
3. Open "Portfolio" on top tool-bar.
4. Select the account, and right click. Select "Edit Security."
5. Change the Symbol to something easy to remember, but that does not conflict with an existing security name (i.e. any official ticker name). Use the following fund names if you want to use the files provided by Allen at his website:
  - C Fund = TSPCF
  - F Fund = TSPFF
  - G Fund = TSPGF
  - I Fund = TSPIF
  - S Fund = TSPSF
  - L 2040 = TSPL40F
  - L 2030 = TSPL30F
  - L 2020 = TSPL20F
  - L 2010 = TSPL10F
  - L INCOME = TSPLIF

6. Go to the [TSP website](#). Click on "[Share Prices](#)."
7. Cut and paste the quarter's worth of data into Excel.
8. Open a new spreadsheet and put the fund-symbol you used in Step 5 in column A. In column B list the date. In column C, list the TSP price. Make sure that the date (column B) is in the M/DD/YYYY format. To do this, right-click on column and choose correct format under "Format Cells."
9. Save the file as a CSV (comma delimited).
10. Import the file into Quicken under File-> Import -> Import Prices. Type the name of the file and click OK. **Note:** "Import Prices" will only show up if you have clicked on "Investing Center" on the tool-bar on the left side of the screen.
  - Quicken does not have a file browser so it is easiest to save the csv file into the root directory (c:\) so when you type the file name in to quicken, it is just c:\tsp.csv .
11. Repeat for each fund.
12. Or, replace steps 6-9 and [download the all of the funds in a consolidated file](#) from TSPTalk.com. (The download appears at the bottom of the post.) With this file, which is updated quarterly, you only need to import one file and you should have all the historical prices for C, F, G, I, S all the way back to 2003. The L-funds started in Aug of 2005 so the data from those are included starting then. After completing step 12, complete step 10 to import into Quicken.
13. Done!

The author of Middleriver.net is a Soldier in the US Army. He has an amusing post about a C-130 ride when he was deployed to the Middle East. I find it interesting to hear a Soldier's side of the experience because until recently, I was a C-130 mechanic in the USAF.

His story about using the 'facilities' is all too true. While I was on a recovery flight to Afghanistan, I had to show the comedian Drew Carey how to use it. I'm sure Allen and I have been to many of the same places. Maybe even at the same time! Thanks to Allen for providing the millions of TSP users his files and instructions, and more importantly, thanks for his service to his country. 😊

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## About Ryan Guina

Ryan Guina is the founder and editor of Cash Money Life. He is a writer, small business owner, and entrepreneur. He served over 6 years on active duty in the USAF and is a current member of the IL Air National Guard.

Ryan started Cash Money Life in 2007 after separating from active duty military service and has been writing about financial, small business, and military benefits topics since then. He also writes about military money topics and military and veterans benefits at [The Military Wallet](#).

Ryan uses Personal Capital to track and manage his finances. Personal Capital is a free software program that allows him to track his net worth, balance his investment portfolio, track his income and expenses, and much more. [You can open a free account here](#).

### Allen

Hi Ryan,

No problem on posting the TSP to Quicken HOWTO on your site. It is not exactly the most obvious solution but after I figured it out it is pretty easy. I just hope other people will find it useful too.

The C-130 flight- what I didn't say was that the Air Force mechanics that were on board probably saved us from having to do an emergency landing in a very unfortunate place (use your imagination and draw a line from Qatar to Afghanistan)... They were hero's in my book!

-Allen

## Ryan

I made that flight a few times. There aren't any nice stops in between! I'm glad you guys made it safely!

In my book, all the people serving over there are heroes. 😊

## Jeff

Your method works for importing the share prices, but does nothing for importing the purchase transactions. I am much more concerned with entering the transactions than the daily share prices. Besides the transaction prices serve to update the share prices on the days they occur.

Big Red Consulting sells an Excel add-on that creates a QIF file that can then be imported into Quicken. <http://www.bigredconsulting.com/aboutofxwriter.htm>. To get the information into Excel, I copy and paste the text of the transactions from the pdf of a statement into a text file and modify that into the format required by the Excel add-on. It's a bit tedious and the add-on is a bit expensive (\$49), but it works well and it saves a lot of time and brain-numbing keyboarding compared to entering all the transactions manually.

## Ryan

Thanks for the info, Jeff. That looks like a good tool. I only have a limited amount of TSP entries because I've been out of the military for a few years now, so this won't be a good match for my situation. But for people who are still in the military or government service and have a lot of data, this tool can be very useful!

## Billy

I have created an excel spread sheet that can import daily fund price from the TSP website. There are some things that must be updated manually, but I have managed to get pretty much all of the formulas correct. If you are interested in trying it out let me know. (Any suggestions for improvements are greatly appreciated.)

## **Charlie Brown**

TSP data won't go to Quicken because the Federal Thrift Investment Board won't let members learn of the farce – the TSP doesn't operate on a FIFO basis, as do all ERISA plans. If a member rebalances any amount, the entire account is SOLD and the proceeds from the sale go towards a dollar rebalancing. In ERISA retirement savings plans, only the First-In lots are sold and the proceeds are invested into different (mutual) funds based on how the participant redirected the rebalancing.

This totally flies in the face of the lies the FTIB/TSP told about excessive trading costs incurred. Think about it – if you only wanted to rebalance \$5,000, then why does FTIB/TSP make you TRANSACT your whole account (say \$100,000) and then reinvest (i.e., TRANSACT) your entire account balance into fund families based on that day's close-of-business share pricing. Screwed in upmarkets, very kind in down markets – if you think rebound will come. Just wait – the FTIB/TSP wants to provide mutual fund accounts. More undue transactions and transaction costs – gifted from us.

Quicken does specific sales. Yes, it gets complicated and that's why Quicken is still deficient.

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