

## About Quicken



# Quicken

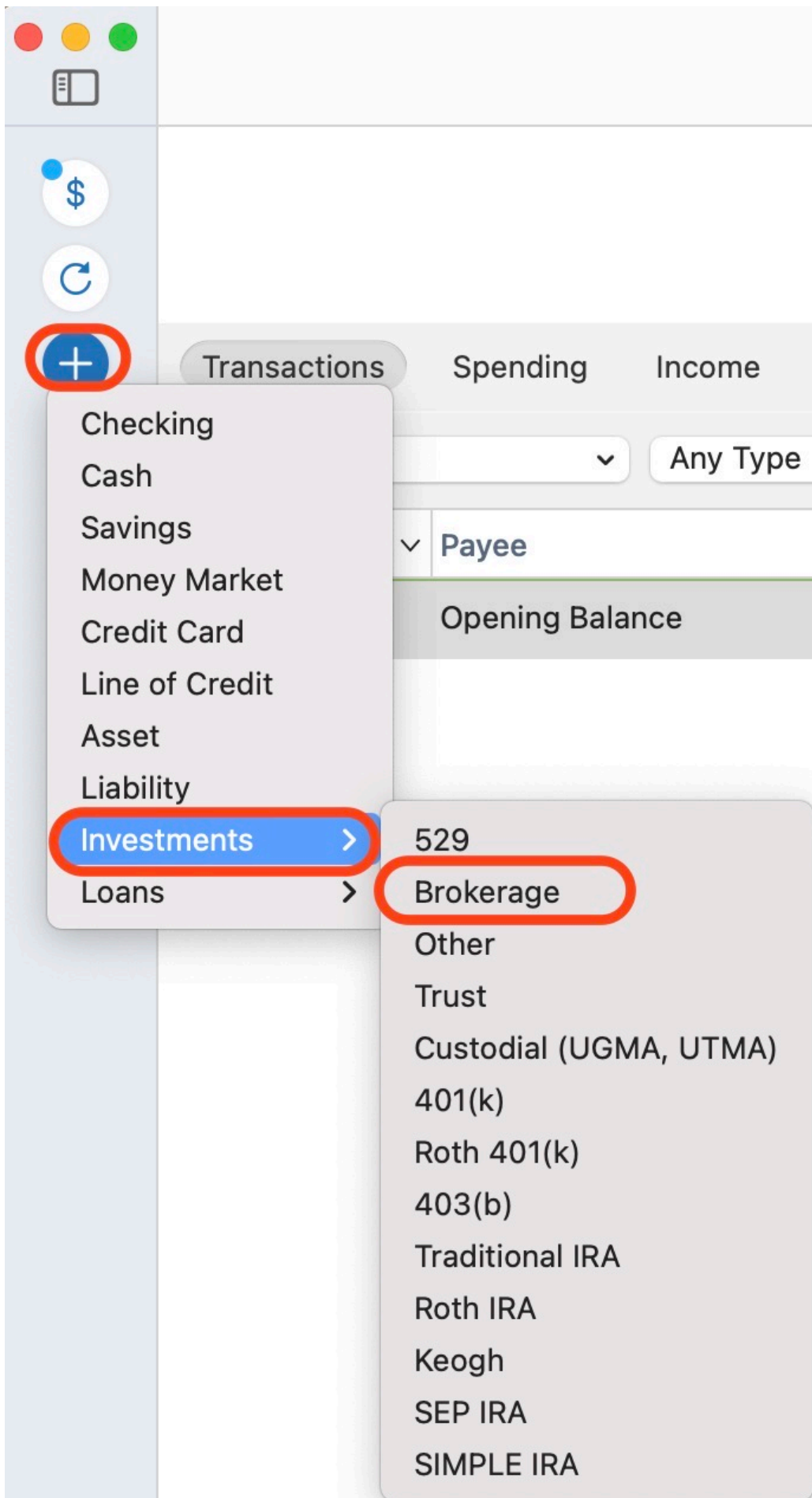
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## Deluxe

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Version 6.5.1 (Build 605.42638.100)

macOS 12.0.1



# Add Brokerage Account

Select your bank. Use the search field or select from the list below.

Q acd

## Best Results

Acorns

## Other Results

Alcoa Community Federal Credit U  
Alpena Community Credit Union A  
Alpha Community Bank IL  
American Lake Credit Union Taco  
American Pride Bank Macon, GA  
Americana Community Bank  
Anoka County FCU  
Area Community CU  
Ashtabula County School Employee  
Bank of America Community Bank  
Bank of Florida Collier and Lee  
Bank of Maharashtra - Corporate Ba  
Bank of Pensacola  
Bank of Tacoma



Acorns

Phone: N/A

<https://www.acorns.com/>



My bank is not in the list

Options

Continue

## Add Brokerage Account

# Acorns

Enter the same info you use to sign in to **Acorns** online

Email Address

\*\*\*\*\*

Password

.....

☒ Add password to keychain

**Protecting your financial information is absolutely critical to us.**

To access your bank or credit cards accounts, we ask you to enter the same information that you use to sign into your accounts at your financial institutions. Your sign-in information is encrypted and stored on our firewall-protected servers.

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Continue



## Add Brokerage Account

Signing in to your bank account...

Please wait while we contact Acorns



## Add Brokerage Account

Acorns (\*\*\*\*\*)

Please answer the question so we can confirm your identity.

We sent a code to\*\*\*. Enter it here to confirm your identity.

551028

### What is this?

Your financial institution requires this security question to confirm your identity. The question asked and answer required is determined by your financial institution not Quicken. Contact your financial institution if you cannot answer the security question.

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Continue

## Add Brokerage Account

Validating your answers...

Please wait while we contact Acorns



## Add Brokerage Account

# 2 Accounts Found

Add or link the accounts you would like added to Quicken.

Account Name & Description	Type	Action	Quicken Account Name
<b>Unknown Acorns</b> Acorns	Brokerage	Add	Acorns
<b>Unknown Acorns Later</b> Acorns Later	401(k)	Add	Acorns Later

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Continue



## Add Brokerage Account

# 2 Accounts Found

Add or link the accounts you would like added to Quicken.

Account Name & Description	Type	Action	Quicken Account Name
<b>Unknown Acorns</b> Acorns	Brokerage	Add	Acorns Invest - Brokerage
<b>Unknown Acorns Later</b> Acorns Later	SIMPLE IRA	Add	Acorns Later - IRA

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Continue

## This financial institution only supports Simple Tracking



### Simple Tracking

Easy tracking with positions only

- ✓ Track your positions and cash balances
- ✓ View portfolio value and net worth over time
- ✓ Keep your portfolio in sync with your brokerage



### Detailed Tracking

Complete transaction & position tracking

- ✓ Includes features from Simple Tracking
- ✓ View and edit your investment transactions
- ✓ Track capital gains/losses, investment income, and more

 You will still be able to sync your account, but you cannot track cost-basis or edit transactions

 [Learn More](#)

[Continue](#)

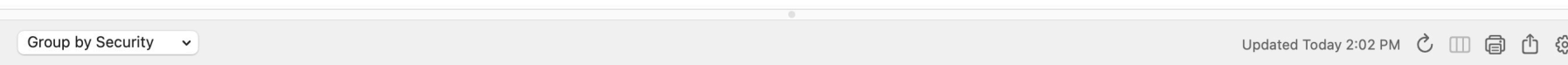
Account Status

Account Status

Connection Status: ● Quicken can connect to the internet. ☐ Show errors only

Status	Last Update	Account ^	Details	Action
●	Today - 2:18 PM	Acorns Inv...- Brokerage	Last Connection Successful 0 new transactions downloaded	Update
●	Today - 2:18 PM	Acorns Later - IRA	Last Connection Successful 0 new transactions downloaded	Update





This portfolio has no securities or cash.

\$

↺

+

HomeReportsBudgetsBills & IncomeCalendarsAlerts

Q

Acorns Later - IRA


Acorns

Market Value\$0.00Day Gain/Loss\$0.000%

DashboardPortfolioTransactions


Data as of: 1/15/2022Updated: Today 2:02 PM

Holdings\$0.000.00%0 Securities


Security	Shares	Price	Value	Change %	Change \$
<div><p>Let's see your holdings</p><p>List all of your holdings in one place.</p><p>Add your investment data to try it out.</p></div>					

Top Movers0 Gainers & 0 Losers

Gainers & LosersBy Value

Security	Value	Change (\$)	Change (%)
<div><p>Bees are top movers too!</p><p>Learn which of your securities made the biggest moves of the day.</p><p>Add your investment data to try it out.</p></div>			

Allocation by SecurityTotal Value \$0.00




Too bad this genie can't make investment data appear

See a pie chart with the breakdown of your securities.

Add your investment data to try it out.

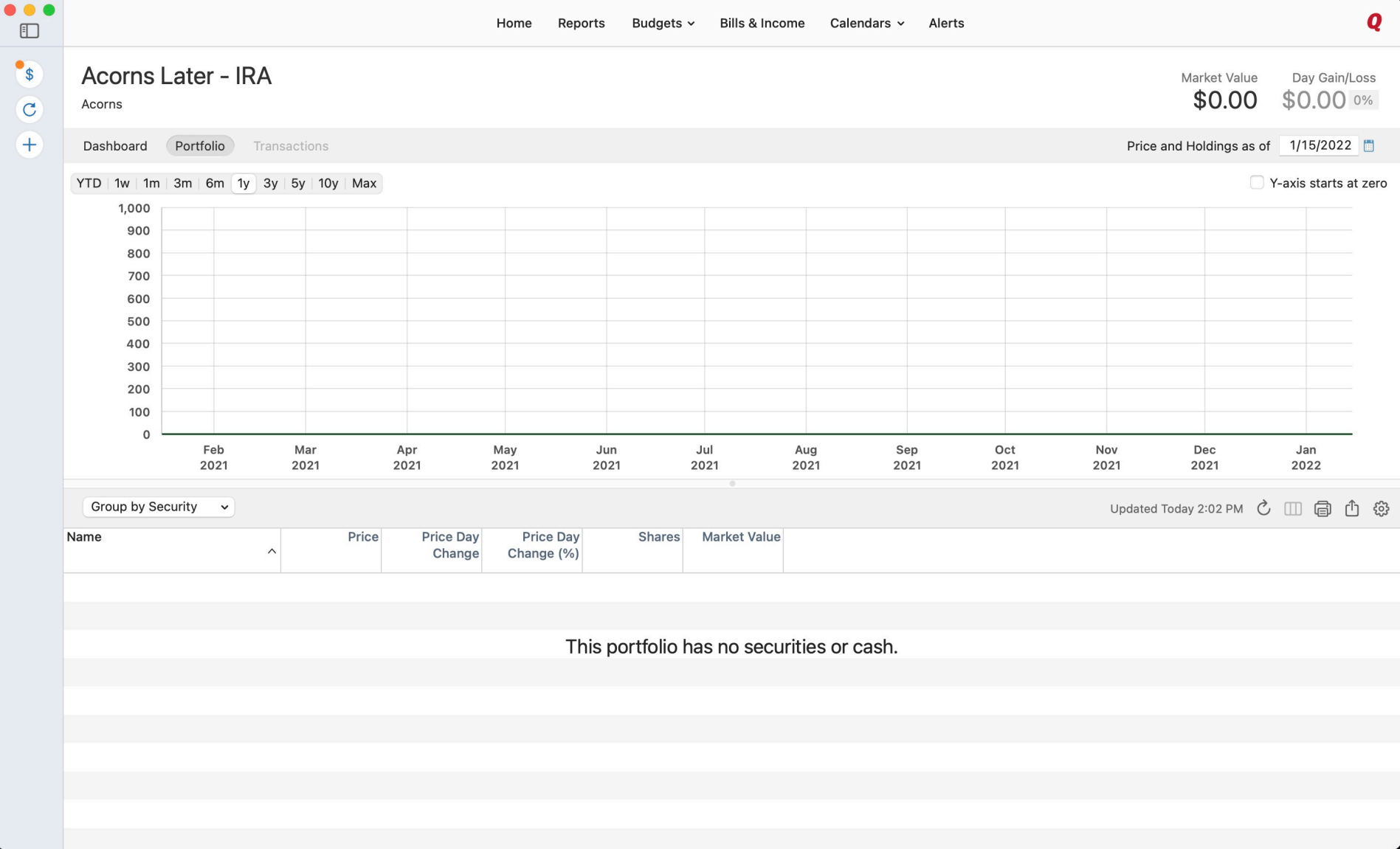
Allocation by Asset ClassTotal Value \$0.00



Here's a pie instead of a pie chart

This is where you'll see the asset class mix of your portfolio.

Add your investment data to try it out.



# Account Settings

Acorns Invest - Brokerage

Details

Downloads

Display Options

Account Name: Acorns Invest - Brokerage

Description:

Currency: US Dollar



USD

Type: Brokerage



Credit Limit:

Notes:

Investment Tracking Method ?

☒ Simple (positions only)

☐ Detailed (positions and transactions)

Cost Basis

Stocks: FIFO



Mutual Funds:

FIFO



Bonds: FIFO



Other:

FIFO



Cancel

Done



# Account Settings

Acorns Invest - Brokerage

Details

Downloads

Display Options

## Login & Connection

Financial Institution: Acorns

Connection Type: Quicken Connect

Intra-bank Transfer: Unavailable

Routing Number: n/a

Account Number: \*\*orns

Customer ID: \*\*\*\*\*

Update Login

Reset Connection

Change Connection Type

Disconnect Account

## Transaction Downloads

☒ Download all available transactions

☐ Download transactions starting: 1/15/2022

Cancel

Done

# Account Settings

Acorns Invest - Brokerage

Details

Downloads


Display Options



- ☐ Hide account in lists (sidebar, reports, and transaction entry lists)
- ☐ Keep account separate (from reports, budgets, and net worth)

Mark Account as Closed

## Scheduled Transactions

Control how scheduled transactions are displayed in your account by selecting this icon above the register: 

Cancel

Done