PACIFIC PREMIER
BANK

Quicken for Windows Conversion Instructions

Quicken for Windows 2012–2015

Web Connect

Table of Contents

Introduction

As *Independence Bank* completes its system conversion to *Pacific Premier Bank,* you will need to modify your Quicken settings to ensure the smooth transition of your data. To complete these instructions, you will need your *[User ID and Password]* for the *Independence Bank* and *Pacific Premier Bank* websites.

It is important that you perform the following instructions exactly as described and in the order presented. If you do not, your service may stop functioning properly. This conversion should take 15–30 minutes.

IMPORTANT:	These instructions are divided into **2 Phases**

- **Phase 1 must** be completed **before [5:00pm PT, 4/09/2015].**

- **Phase 2 must** be completed **on or after [4/13/2015].**

Phase 1: This Phase is time sensitive and **must** be completed **before [5:00pm PT, 4/09/2015].**

Documentation and Procedures

Task 1:   **Conversion Preparation**

1. Backup your data file. For instructions to back up your data file, choose **Help** menu > **Search**. Search for *Backing Up Your Data* and follow the instructions.

2. Download the latest Quicken Update. For instructions to download an update, choose **Help** menu > **Search**. Search for *Update Software* and follow the instructions.

Task 2:   **Connect to Independence Bank**

1. Log in to *Independence Bank* and download your Quicken Web Connect file.

2. Click **File** > **File Import** > **Web Connect File**.

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

4. If new transactions were received from your connection, accept all new transactions into the appropriate registers.

NOTE:	If you need assistance matching transactions, choose **Help menu > Quicken Help**. Search for **Matching Transactions** and follow the instructions.

Task 3: **Deactivate Your Account(s) At Independence Bank**

1. Choose **Tools** menu > **Account List**.
2. Click the **Edit** button of the account you want to deactivate.
3. In the **Account Details** dialog, click on the **Online Services** tab.
4. Click **Deactivate**. Follow the prompts to confirm the deactivation.
5. Click on the **General** tab.
6. Remove the financial institution name and account number. Click **OK** to close the window.
7. Repeat steps 2–6 for each account at *Independence Bank*.

Phase 2:	This Phase is time sensitive and **must** be completed **on or after [4/13/2015].**

Task 4: **Re-activate Your Account(s) at Pacific Premier Bank**

1. Log in to *Pacific Premier Bank* and download your Quicken Web Connect file.
2. Click **File** > **File Import** > **Web Connect File**.
3. If prompted for connectivity type, select **Web Connect**.

NOTE:	Take note of the date you last had a successful connection. If you have overlapping dates in the web-connect process, you may end up with duplicate transactions.

4. Ensure you associate the account to the appropriate account already listed in Quicken. You will want to select **Link to an existing account** and select the matching account in the drop-down menu.

IMPORTANT:	Do **NOT** select **Create a new account**. If you are presented with accounts you do not want to track in this data file, select **Ignore – Don't Download into Quicken** or click the **Cancel** button.

5. Repeat steps 2 – 4 for all of your accounts.

Thank you for making these important changes!