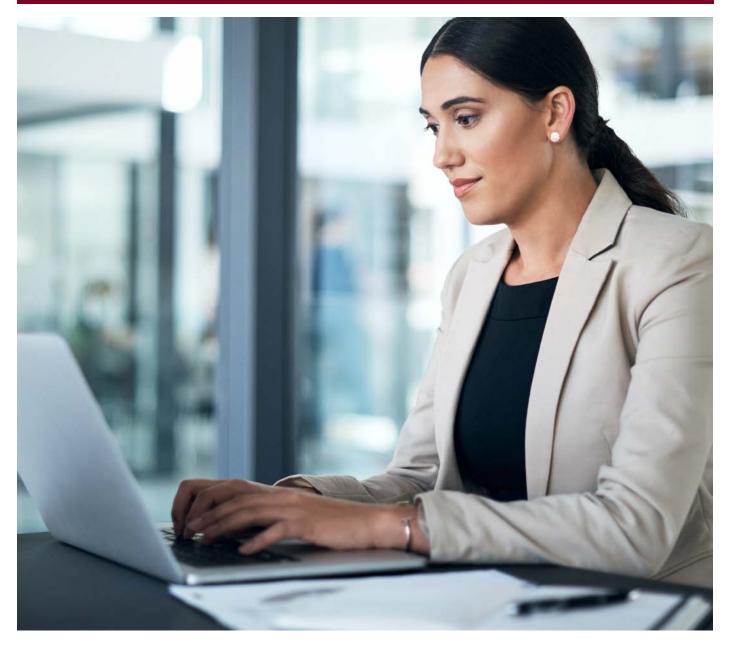
Quicken® for Mac

Getting Started Guide for Pacific Premier Personal[™] Online Users





Connect and Update Your Data

Before you set Quicken to download transactions from Pacific Premier Bank, you will need the following information:

- Pacific Premier Personal Online Username
- Password

Set Up an Account for Pacific Premier Personal Online (Direct Connect)

- 1. Choose Accounts > New.
- 2. Click the type of account you want to set up. For example, you can choose a Checking account.

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 After you choose the type of account you want to add, you will see the financial institution selection screen.
 Enter Pacific Premier Bank, select Pacific Premier Personal Online-DC, then click Continue.

> **NOTE:** You may be asked from the connectivity selection screen to select **Direct Connect** and click **Continue**.



4. Enter your Online Banking Login credentials and click Connect.
Pacific Premier Personal Online-DC
This will allow you to connect directly to your bank and download transactions.
Username:
Password:
Password:
Add Password to Keychain

5. After successfully logging in, your Quicken software will prompt you to add your accounts. Follow the prompts to add your account to your Quicken system.
Protecting your financial information is absolutely critical to us.

Learn more about security,

05/14/22

Set Up an Account for Pacific Premier Personal Online (Web Connect)

- 1. Log into your online access through the Pacific Premier Bank website (www.ppbi.com).
- Download your transactions using the Quicken Web Connect (*.QFX) format and save the file to your computer.
- Open Quicken, then choose File > Import > Bank or Brokerage File.... You will see a navigation window.
- **4.** Navigate to the file you downloaded in Step 2, then click **Open**.
- 5. Click Link an Existing Account if you have an appropriate account in the account list. If you don't have an account yet, click Create a new account and enter a nickname for that account.
- 6. Click Import.
- 7. Click OK to confirm and finish.

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• 05/31/22				MN	Mint.com File (CSV)					

Deposit from Home expenses

Questions? Contact our Client Services at 855.343.4070.