

Quicken Windows Direct Connect and Express Web Connect

Note: Direct Connect will no longer be available at 7:00pm on July 16. Instead, you can search for Johnson Financial Group and choose Express Web Connect as an option for seamless transaction updates from MyJFG.

On the 1st Action Date Before 7:00pm on July 16:

1. Back up your Quicken Windows Data File. Go to **File > Backup and Restore > Backup Quicken File**.
2. Download the latest Quicken Update. Go to **Help > Check for Updates**.
3. Complete a final transaction download. Accept all new transactions into the appropriate registers.

On the 2nd Action Date Beginning July 20:

1. Deactivate online banking connection for accounts connected to Johnson Financial Group's eBanking.
 - a. Choose **Tools > Account List**.
 - b. Click **Edit** on the account to deactivate.
 - c. In Account Details, click **Online Services**.
 - d. Click **Deactivate**. Follow prompts to confirm deactivation.
 - e. Click the **General** tab.
 - f. Delete Johnson Bank and Account Number information. Click **OK** to close window.
 - g. Repeat steps for any additional accounts that apply.
2. Activate MyJFG connection for your accounts at Johnson Financial Group.
 - a. Choose **Tools > Account List**.
 - b. Click **Edit** on the account you want to activate.
 - c. In Account Details, click **Online Services** and then choose **Set up Now**.
 - d. Type **Johnson Financial Group** in the search field and click Next.
 - e. Enter your **MyJFG credentials**.

Express Web Connect uses the same credentials you use for your MyJFG login.

Important: If your credentials do not work, contact the Johnson Financial Group Customer Support Center.

- f. Ensure you associate the accounts to the appropriate accounts already listed in Quicken. Select **Link to an existing account** and select the matching accounts in the drop-down menu.

Important: Do NOT choose "Create a new account" unless you intend to add a new account to Quicken. If you are presented with accounts you do not want to track in this data file, choose **Ignore - Don't Download into Quicken** or click **Cancel**.

- g. After all accounts have been matched, click **Next** and then **Done**.

Quicken Mac Direct Connect and Quicken Connect

Note: Direct Connect will no longer be available at 7:00pm on July 16. Instead, you can search for Johnson Financial Group and choose Express Web Connect as an option for seamless transaction updates from MyJFG.

On the 1st Action Date Before 7:00pm on July 16:

1. Backup Quicken Mac Data File and Update the application.
 - a. Choose **File > Save a Backup**.
 - b. Download the latest Quicken Update. Choose **Quicken > Check for Updates**.
2. Complete a final transaction download.
 - a. Complete last transaction update before the change to get all of your transaction history up to date.
 - b. Accept all new transactions into the appropriate registers.

On the 2nd Action Date Beginning July 20:

Activate the MyJFG connection for your accounts at Johnson Financial Group.

1. Click your account in the Accounts list on the left side.
2. Choose **Accounts > Settings**.
3. Select **Set up transaction download**.
4. Enter Johnson Financial Group in the search field, select the correct option and click **Continue**.
5. Enter your MyJFG credentials.

Express Web Connect uses the same credentials you use for your MyJFG login. .

Important: If your credentials do not work, contact the Johnson Financial Group Customer Support Center.

6. In the "Accounts Found" screen, ensure you associate each new account to the appropriate account already listed in Quicken. Under **Action**, choose **Link** to pick your existing account.

Important: Do NOT select "ADD" in the Action column unless you intend to add a new account to Quicken.

7. Click **Finish**.