Quicken® Personal Finance Software 2007-2010 for Windows®
The PrivateBank Consolidation Instructions for Web Connect

As the former Founder's Bank system consolidates with The PrivateBank, you will need to modify your Quicken settings so that you are able to log in to Private NetBanking and successfully download your transactions into Quicken. **This update is time sensitive; you must perform steps A-C on or before 4:00 p.m. CST on January 29th, 2010, and steps D-F on or after 8:00 a.m. CST on February 1st, 2010.**

It is important that you perform the following instructions exactly as described and in the order presented. If you do not, your online service may stop functioning properly. This conversion should take 10 minutes.

Note: In the following screen shots, red icon numbers match step number instructions. All financial institution and register information is fictitious and for illustration only.

Within this guide, this symbol displays to indicate that there are optional FAQs.

A. BACK UP YOUR CURRENT DATA

1. Choose **File** menu → **Backup**.
2. Specify which file to back up and where you want the backup saved in the **Quicken Backup** dialog, and then click **OK**.

B. DOWNLOAD THE LATEST QUICKEN UPDATE

1. Choose **Online** menu → **One Step Update**.
2. In the **One Step Update Settings** dialog, uncheck any boxes that are checked, and then click **Update Now**.
3. If a software update is available, then you will be prompted to apply it now.
4. Once the update is complete, **Close** Quicken.

C. GET YOUR LATEST TRANSACTIONS FROM FOUNDER'S BANK

Download to Quicken

1. Log in to Founder's Bank online banking. Download your transactions through January 29th into Quicken.

Note: You will not be able to download these transactions after January 29th.

Repeat this step for each account that you use for online banking or investing.

2. Once the transactions are downloaded, **accept all the transactions into your Quicken account register**.

Important: You will not be able to proceed to the next section until you accept all transactions in the **Downloaded Transactions** tab.

- For help accepting transactions, choose **Help** menu → **Quicken Help**. In the **Type in the word(s) to search for:** prompt, enter **Accept downloaded transactions**.
- For assistance reconciling your account register, choose **Help** menu → **Quicken Help**. In the **Type in the word(s) to search for:** prompt, enter **Reconciling an account**.

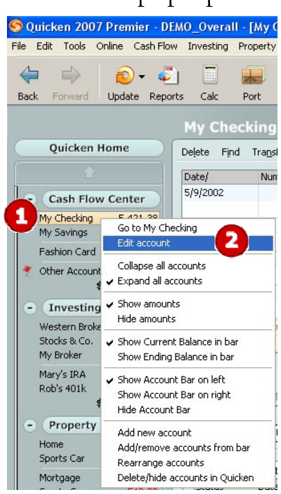
On or after 8:00 a.m. CST FEBRUARY 1st, log in to the new Private NetBanking site.

D. DEACTIVATE YOUR ACCOUNTS WITH FOUNDER'S BANK AND REACTIVATE WITH THE PRIVATEBANK – WEB CONNECT

1. *Quicken banking customers:* right-click your first Founder's Bank account from the list under **Cash Flow Center**.

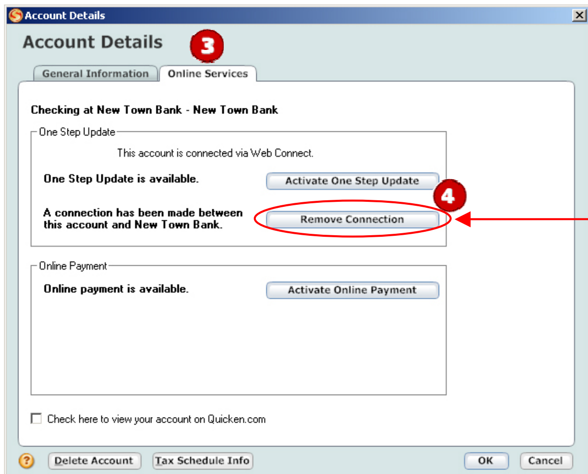
2. Select **Edit account** from the pop-up menu. **Edit account number, etc. as needed.**

Banking Customers



Investing Customers

3. In the **Account Details** dialog, click the **Online Services** tab.



This button varies:

- If you manually download transactions, this button displays as **Remove Connection.**
- If you use One Step Update to automate downloading your transactions, this button displays as **Remove from One Step Update.**

4. Click **Remove Connection** or **Remove from One Step Update** in the **One Step Update** area. Confirm the remaining prompts.

5. Click the **General Information** tab. In the Financial Institution field, type **The PrivateBank – Web Connect.** Optionally, edit the **Account Name** field to reflect the new financial institution.

6. Click **OK** to close the **Account Details** dialog.

Repeat steps **1** through **6** for each **Founder's Bank** account from which you download transactions.

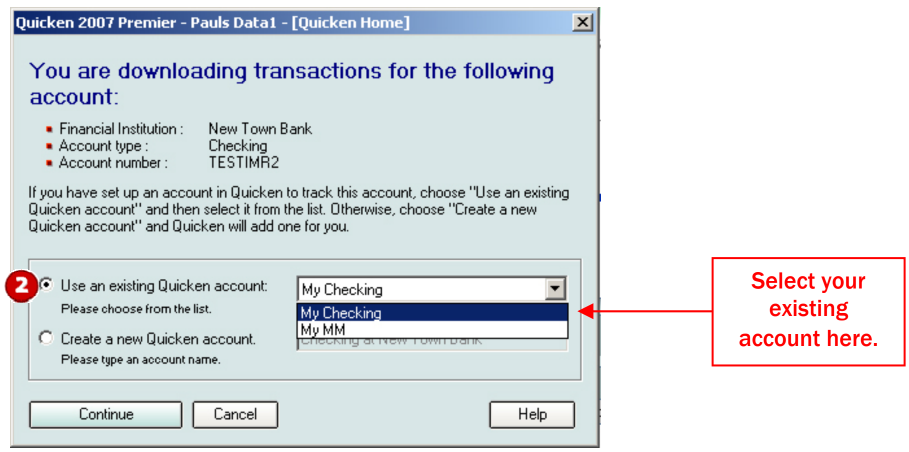
E. ACTIVATE YOUR ACCOUNTS WITH The PrivateBank – Web Connect

IMPORTANT: Complete section **E** ***on or after*** **February 1st**

1. Anytime on or after February 1st open a Web browser and log in to Private NetBanking. Download your transactions into Quicken.

Important: To avoid the possibility of creating duplicate records when downloading into Quicken, select a "from" date that does not include records previously downloaded.

2. Click the **Use an existing Quicken account** radio button**.** In the corresponding drop-down list, select the Quicken account that you used for The PrivateBank.



Repeat steps **1** and **2** for each account that you will use for online banking or investing with The PrivateBank.

F. AUTOMATING YOUR WEB CONNECT DOWNLOADS [OPTIONAL]

Express Web Connect provides the option of activating the One Step Update feature, which automates the downloading of Web Connect data. To activate the One Step Update feature, take either of these actions:

- If you see the **Activate One Step Update** prompt during the Web Connect download process, click **Yes**, and then click **Activate**.
- From Quicken, choose **Online** menu → **One Step Update**. In the dialog that displays, choose **Activate One Step Update** link next to The PrivateBank.

Once activated, you can choose **Online** menu → **One Step Update** to perform downloads.

THANK YOU FOR MAKING THESE IMPORTANT CHANGES!

You may contact us at 877-327-7375 24 hours a day, 7 days a week for assistance.