

Linking Your Retirement Account to Quicken®

You can now download your plan account information to the popular personal financial management software package – Quicken®. At your command, an automated link feeds current, accurate data – including balances and transactions – to Quicken¹. With this time saving capability, you can plan and make decisions viewing all your investment information at once.

To download plan account information to Quicken, follow the steps below. If you have questions about setup procedures, you can use the program's Help feature.

STEP 1 – GETTING STARTED

- Begin at the Quicken start-up screen on your desktop and click on **Investing**, then **Investing Accounts** then **Add Account**.
- At the prompts, select **ING Institutional Plan Services** from the list, then **401(k) and 403(b) retirement plans**.
- Enter your choice for a name for your plan account.
- Click on the setup method you want to use – **Online (recommended)** or **Manual**. To keep going, click on **Next**.

STEP 2 – IDENTIFY YOURSELF

- Enter your **Username/Social Security number@msrs** for example, 123456789@msrs
- Enter the same **Password²** you use to access your Plan Web site. To keep going, click on **Next**.

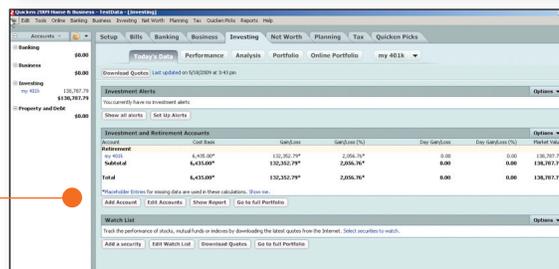
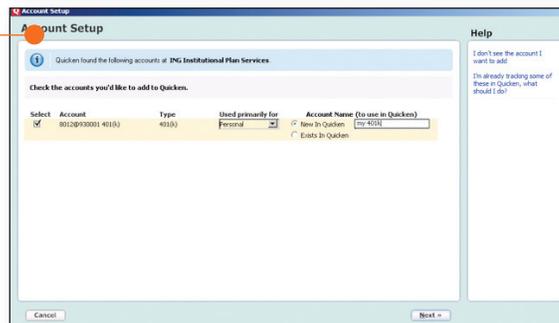
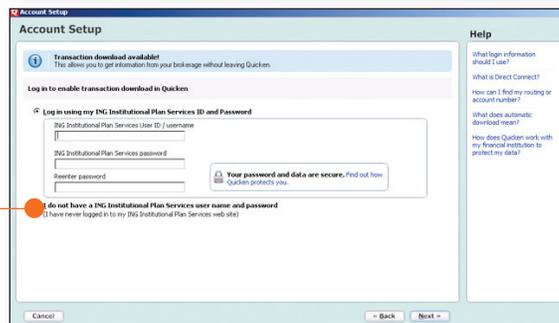
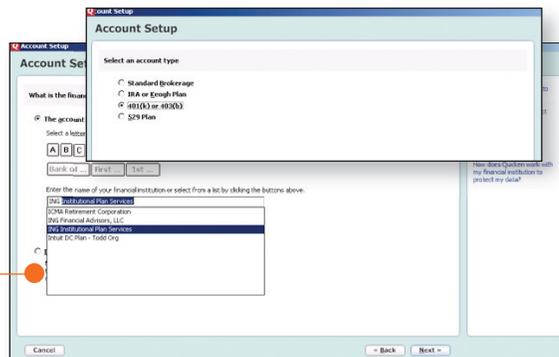
STEP 3 – SELECT PLAN ACCOUNTS

- Click on the **name** of the first plan account you want to download. To keep going, click on **Next**.
- Click on the **names** of additional plan accounts to download. Enter your choice for a name for each additional plan account. To keep going, click on **Next**.
- The screen displays your **account set-up**. To confirm the information, click on **Next**.

STEP 4 – DOWNLOAD COMPLETE

- The program downloads and registers the information from your plan account(s) and displays it.
- Next time you use the program, you can update your plan account information with the latest transactions and balances – with a single click of the mouse!

For instructions to link your retirement account to Microsoft Money®, please refer to the following page.



1 If you don't already have Quicken® on your computer, you can go to <http://www.intuit.com/> to purchase and download the software.
 2 If you forgot your Password, call the Customer Contact Center or visit your Plan Web Site.



Linking Your Retirement Account to Microsoft Money®

You can now download your plan account information to the popular personal financial management software package – Microsoft Money®. At your command, an automated link feeds current, accurate data – including balances and transactions – to Microsoft Money¹. With this time saving capability, you can plan and make decisions viewing all your investment information at once.

To download plan account information to Microsoft Money, follow the steps below. If you have questions about setup procedures, you can use the program's Help feature.

STEP 1 – GETTING STARTED

- Begin at the Microsoft Money® start-up screen on your desktop and click on **Banking**, then **Add A New Account**, then select **Investment**.
- At the prompt, select **ING Institutional Plan Services** from the list, then select **Yes, I have sign-in information**.

STEP 2 – IDENTIFY YOURSELF

- Enter your **Username/Social Security number@msrs** for example, 123456789@msrs
- Enter the same **Password²** you use to access your Plan Web site. To keep going, click on **Next**.

STEP 3 – SELECT PLAN ACCOUNTS

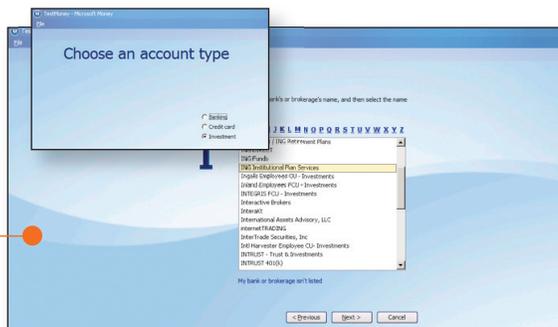
- Choose your settings and frequency of updates, then click on **Next**.

STEP 4 – DOWNLOAD COMPLETE

- The program downloads and registers the information from your plan account(s) and displays it.
- Next time you use the program, you can update your plan account information with the latest transactions and balances – with a single click of the mouse!

For instructions to link your retirement account to Quicken®, please refer to the previous page.

To learn more about the application's features and benefits, access the help menu within the software. For questions about your Plan, or to speak with a Customer Service Associate call 1-800-657-5757.



1 If you don't already have Microsoft Money® on your computer, you can go to <http://www.microsoft.com/money> to purchase and download the software.

2 If you forgot your Password, call the Customer Contact Center or visit your Plan Web Site.

