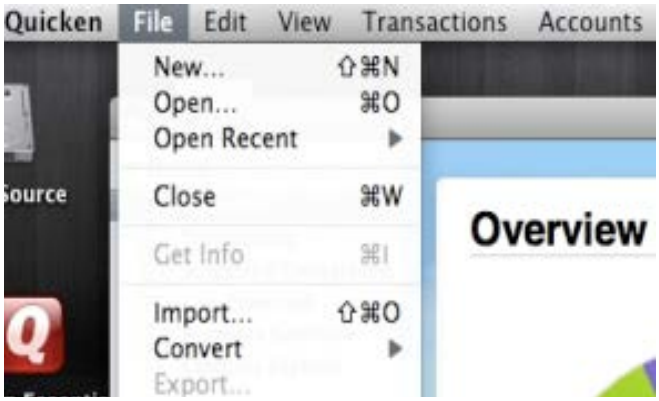
Direct Connect Conversion Instructions
Quicken Essentials for Mac 2010

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. .

Back Up Your Data

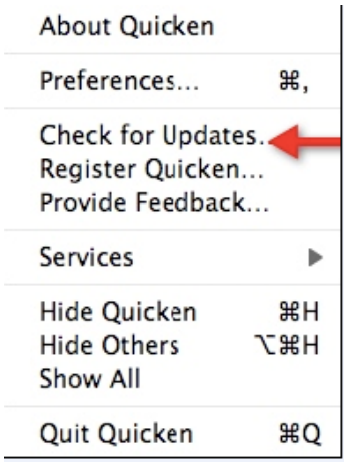
1. Click on the File menu → Back Up → To Disk

2. Choose a file name and location →click Save

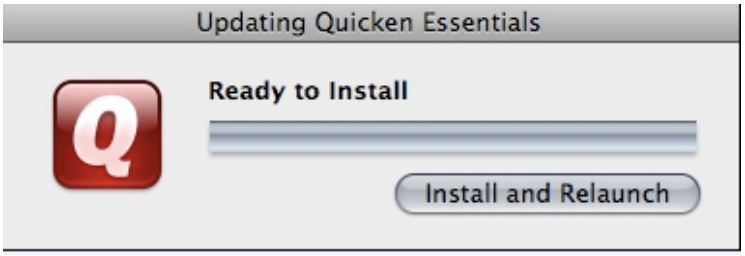


Download the Latest Quicken® Update

1. Click on the Quicken menu the top tool bar and select Check for Updates

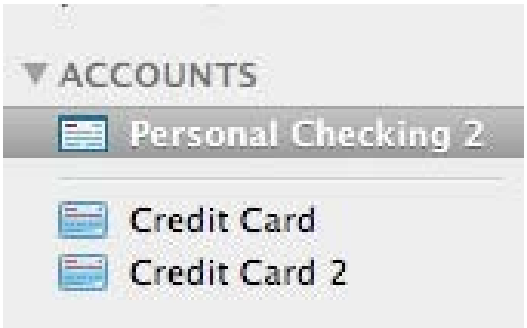


2. If a software update is available, you will be prompted to download the update.



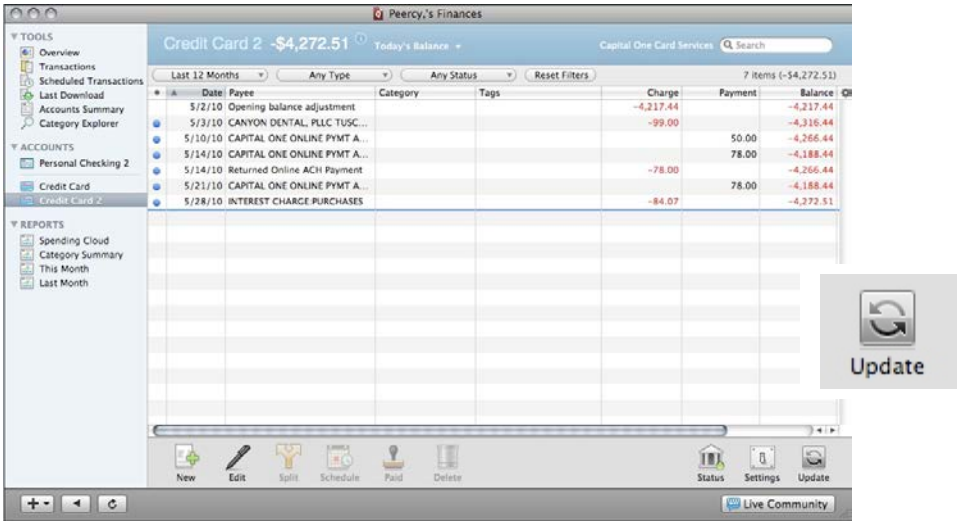
Get Your Latest Transactions

1. Select the account to be updated.



2. Click Update.

3. Enter your PIN and download your transactions into Quicken.



4. Repeat steps 2 and 3 for each account that you will use for online banking and investing.

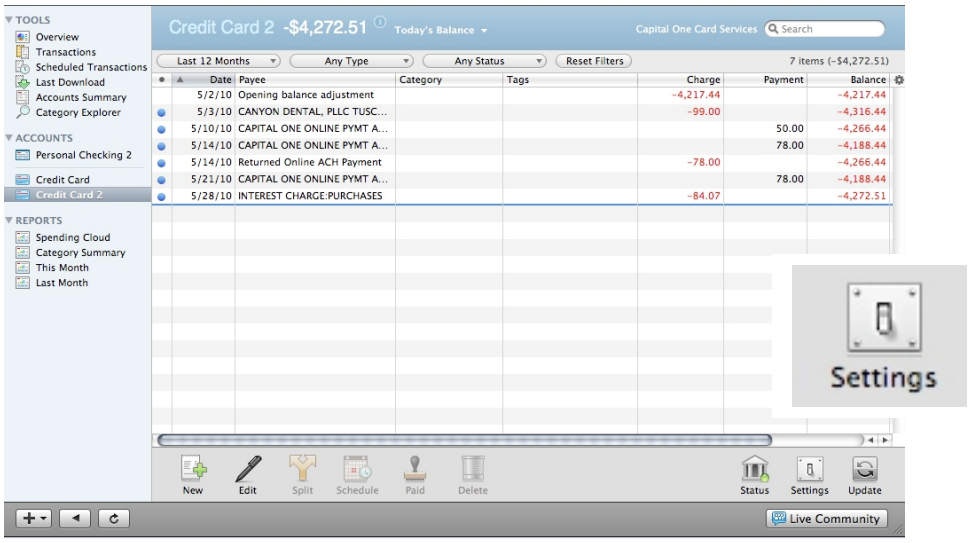
5. Once the transactions are downloaded, accept all transaction into your Quicken account from the Downloaded Transaction tab.

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

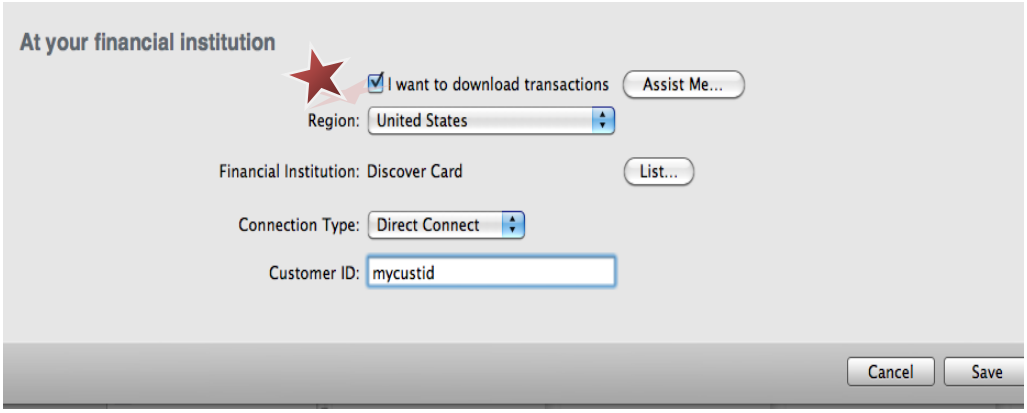
For help reconciling your account register, choose Help menu → Search for reconcile → select Reconcile Account

Deactivate Your Accounts

1. Select the account you want to deactivate →click Settings.



2. In the "**At your financial institution"** section of the settings page, uncheck the "I want to download transactions" box. This will deactivate the online banking feature for this account. If you return to this screen you will see the financial institution is no longer listed

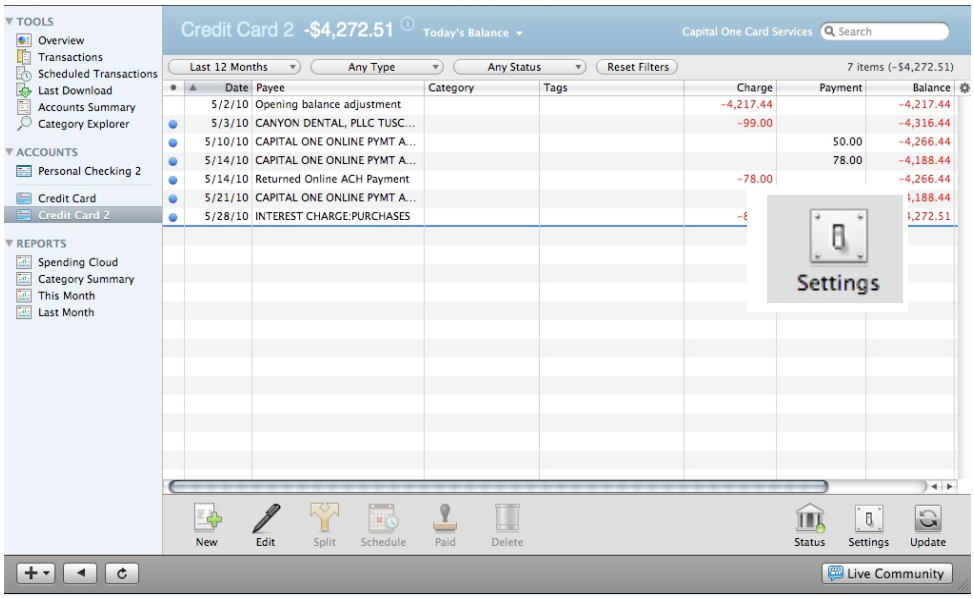


3. After you have made the changes, click Save to complete the deactivation process

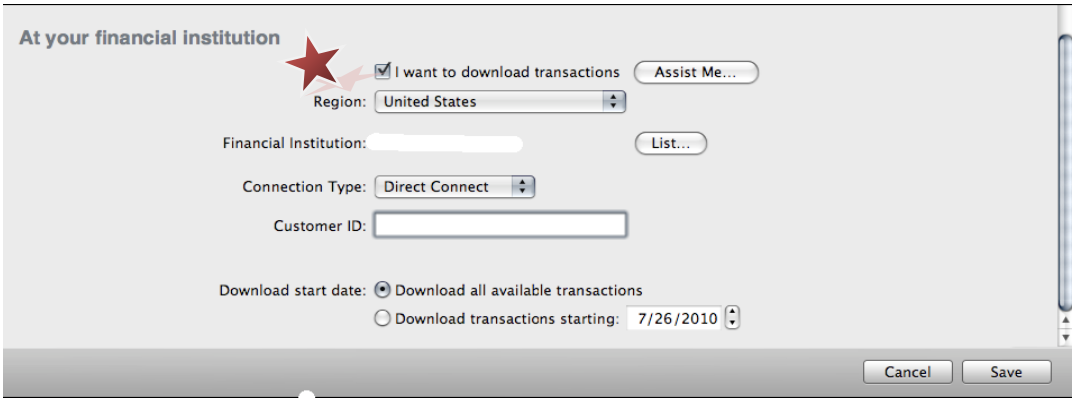
4. Repeat steps 1 through 3 for each online account (such as checking, savings, credit cards and brokerage).

Activate your Account for Direct Connect

1. Select your account → click Settings.



2. Check the "I want to download transactions" box.
3. Click the List button to select your financial institution (The Bank of Kentucky, Inc).



4. After selecting the proper financial institution from the list, select continue to complete the online banking activation process. Ensure you have selected the download method, Direct Connect.

5. Enter your Customer ID. Click Save.

6. Complete an update for your account by clicking on the Update icon and entering your PIN to download your transactions into Quicken.

7. Repeat steps 1 through 7 for each online account (such as checking, savings, credit cards and brokerage).