

## QuickBooks® and Quicken® Upgrade

We are happy to share that INTUIT is upgrading to a new online and mobile banking system beginning **Tuesday, March 18, 2025**.

The upgrade *will require that you make changes* to your QuickBooks® or Quicken® software with *two separate actions*.

### ACTION 1

**COMPLETE *before* March 18, 2025**

- Current online banking clients who use either QuickBooks® or Quicken® will need to perform a **data file backup** and a **final transaction download** **BEFORE** Tuesday, March 18, 2025.
- Note that transaction history might not be available after the upgrade, and clients may have services interrupted from March 18, 2025, until the conversion is complete on March 26, 2025.
- QuickBooks® or Quicken® Users are encouraged to **download a QFX/QBO file** during the outage. The following services may not work during the outage.
  - ▶ Quicken® Win/Mac Express Web Connect
  - ▶ QuickBooks® Online Express Web Connect
  - ▶ Mint

### ACTION 2

**Wednesday, March 26, 2025**

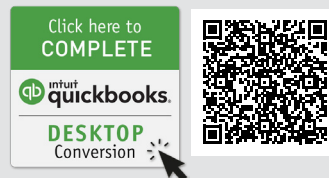
- The remaining steps for the conversion can be completed now that the new online and mobile systems will be in place.
- QuickBooks® or Quicken® Users *will need to complete the de-activate/re-activate of your online banking connections*.

*(Click on the button or scan the QR Code.)*

Quicken®



QuickBooks® Desktop



QuickBooks® Online



Please *carefully review* your downloaded transactions after completing the migration instructions to ensure no transactions were duplicated or missed on the register.

If you have any questions, please contact us at 217-875-3131.