

Quicken Help file

Getting Started

Deciding where to start

You can set up an account in Quicken to track almost any account you own in the real world. The more you include, the more closely Quicken reflects your true financial situation.

Choose the features below that match your personal goals.

- Cash flow

Add checking, savings, credit card, and cash accounts to:

- Track income and expenses
 - See where your money really goes
 - Keep more accurate records
 - Balance your checkbook easily
 - Save time with your banking and bill-paying chores
 - Download transactions from your financial institution
 - Receive bills online
 - Make online payments
-

- Investment

Add brokerage, IRA, 401(k), and other investment accounts to:

- Track all your family's investments in one place, across many different brokerages, institutions, and administrators
- Analyze your holdings
- Monitor your performance
- Maximize your after-tax yield
- Create a personalized asset allocation target
- Balance your portfolio
- Track employee stock options and stock purchase plans
- Download transactions from your brokerage or financial institution

-
- Property & debt

Add house, vehicle, asset, and loan accounts to:

- Calculate and automatically update your net worth
- Track loan balances and payment schedules
- Track loan interest

-
- Tax related

Set up a paycheck and tax-related accounts to:

- Simplify tax planning
- Estimate your upcoming tax liability
- Save time with tax preparation
- Export Quicken data into TurboTax
- Minimize your tax bill

More information

- Quicken help file.
- <https://quicken.custhelp.com>