

# 401(k) Activity Download Guide

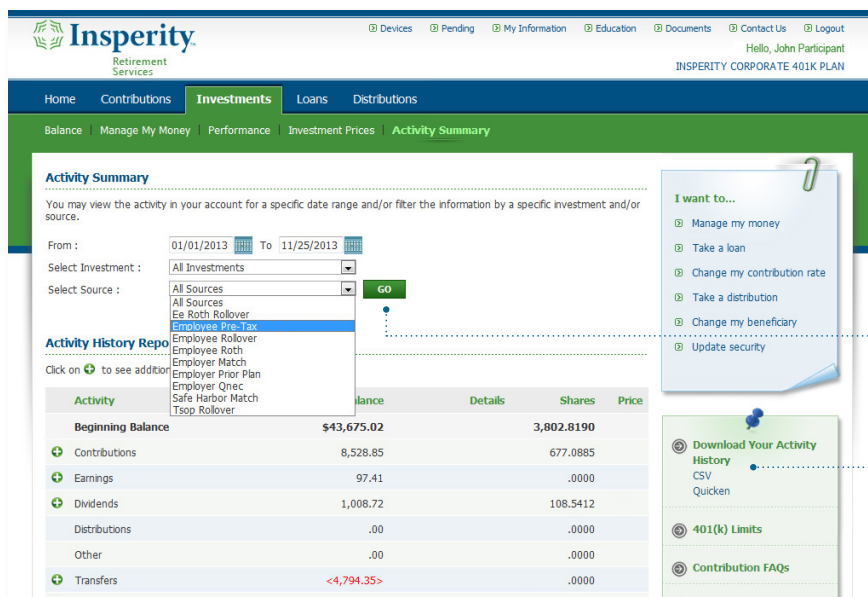
## Exporting Your 401(k) Account Data

If you currently use a personal finance program, such as Quicken® software or the Mint® online application to consolidate your financial information, you can include your 401(k) account activity.

### Exporting Your 401(k) Account Data from the Retirement Service Center

You have two file format options for exporting your 401(k) account activity from the Retirement Service Center<sup>SM</sup>. You can export your data in the CSV (comma separated value) or Quicken QFX file format. To get started, use the following links:

**Investments > Activity Summary > Download Your Activity History**



The screenshot shows the Insperity Retirement Services interface. The 'Activity Summary' page is active, displaying a table of account activity. The table has columns for 'Activity', 'Balance', 'Details', 'Shares', and 'Price'. The activity includes Beginning Balance, Contributions, Earnings, Dividends, Distributions, Other, and Transfers. A sidebar on the right contains a 'I want to...' menu with options like 'Manage my money', 'Take a loan', and 'Download Your Activity History'. A callout box points to the 'Download Your Activity History' link, which offers CSV and Quicken file formats.

You can export the activity in your account for a specific date range and filter the information by a specific investment and/or source.

Download Your Activity History

### Exporting Data To A CSV File

CSV files use a plain text format that can easily be opened by many spreadsheet and database programs. Once you have set your date range and filters, select the download link to create a file. You will be given the option to open the file or save it to your computer. The file will list investment value, number of shares and price for each activity (contributions, transfers, earnings, etc.) during the time frame you have selected.

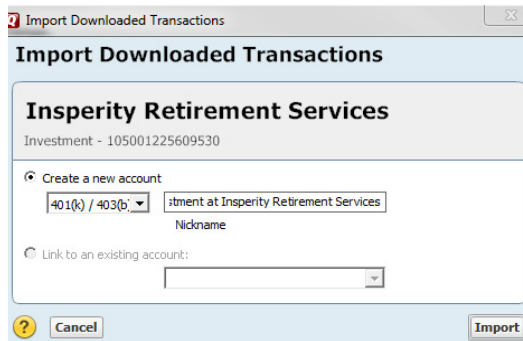
### Exporting To Quicken

You can export your 401(k) activity history directly to Quicken®. (Please note, if you do not have Quicken software installed, a File Download dialog box will open for you to save the file in the Quicken proprietary file format.)

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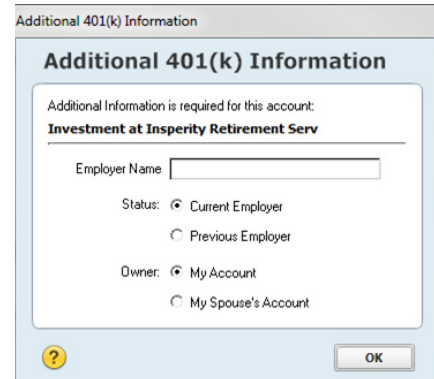
(Exporting to Quicken continued)

If you have Quicken software installed, a File Download dialog box will open. Selecting Open will automatically open Quicken and an Import Downloaded Transactions dialogue box will appear for you to create a new account or link to an existing account.



**Note:** If this is your first time downloading your 401(k) account data to Quicken, select Create a new account, and then Import.

You will also be prompted to enter additional 401(k) information.



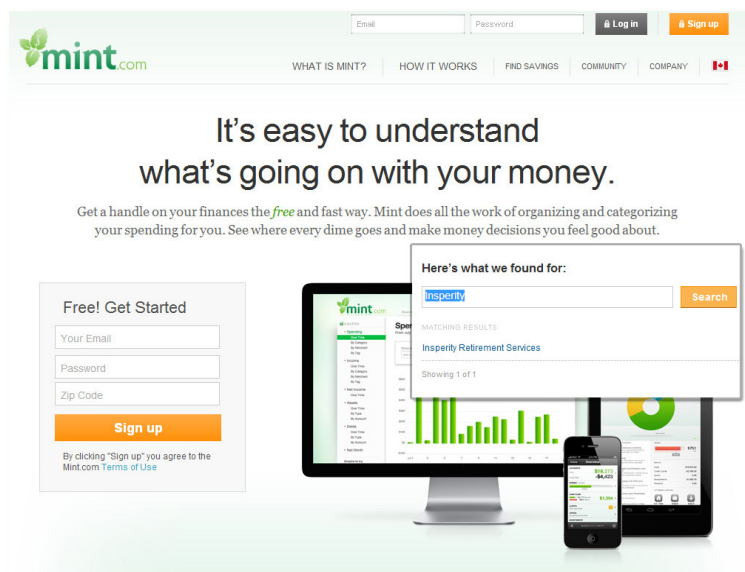
Once completed, hit OK and your data will be downloaded. You will receive a Summary Update screen to confirm the download. When you close this screen, you are ready to view the data in Quicken.

## Exporting Your 401(k) Account Data to Mint

If you use the Mint® online application to consolidate your financial accounts, you can direct Mint to add information from your 401(k) account with Insperty Retirement Services. Once you log into the Mint website, follow the prompts to search for Insperty Retirement Services. This will allow Mint to export your 401(k) account activity automatically from the Retirement Service Center.

**Important:** Make sure you have created a unique user ID and password for the Retirement Service Center because your user ID and password for Insperty Premier™ will not work. You can do this by logging into the Retirement Service Center via Insperty Premier at portal.insperty.com and changing your user ID and password under the Security tab of the My Information page.

**Note:** Changing your Retirement Service Center account ID and password will not affect your Insperty Premier login credentials.



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Note: This Guide is for informational purposes only and is not intended to instruct on the use of Quicken software or the Mint online application. For information on using Quicken and Mint, visit their respective websites at [quicken.intuit.com](http://quicken.intuit.com) and [mint.com](http://mint.com).

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