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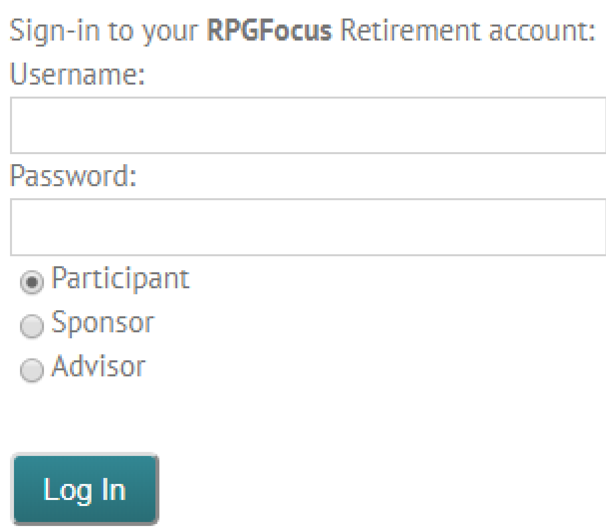
Export Participant Transactions to Quicken

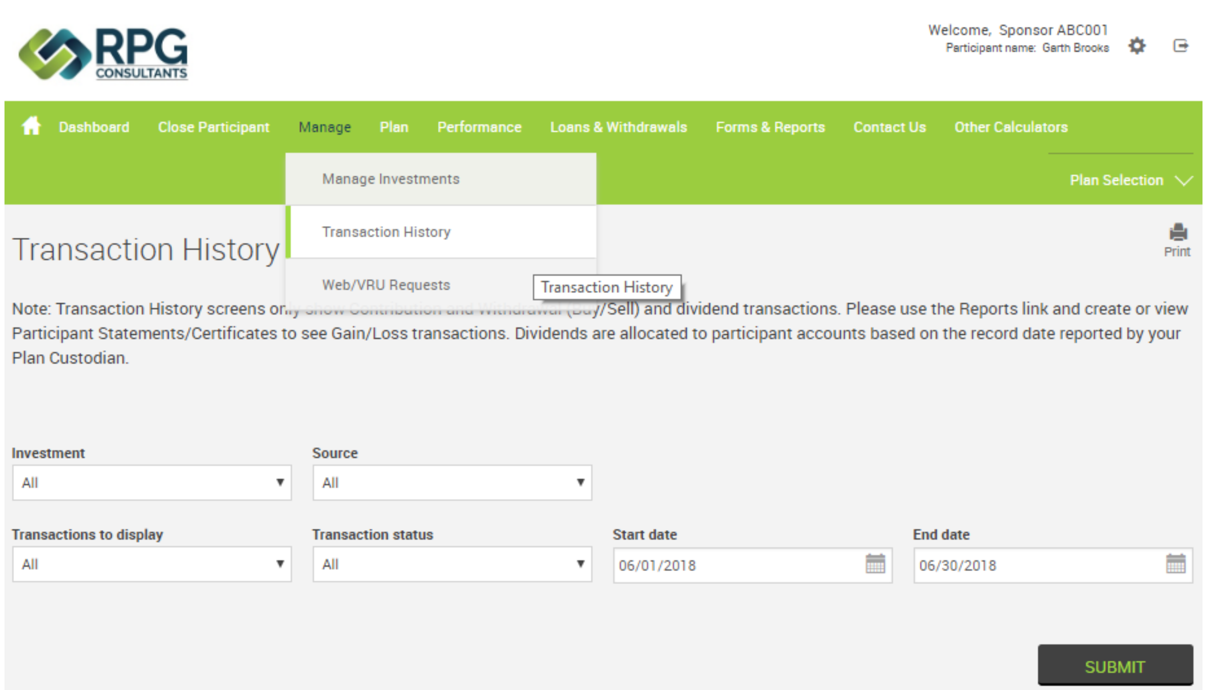
The following steps will enable you to export a transaction history report from your RPG portal, convert from CSV to Quicken and import the data to Quicken.

Export Transaction History

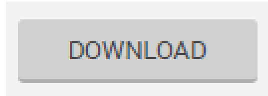
1. Visit myfocus.rpgconsultants.com and sign in to your RPGFocus retirement account.



2. Go to Manage -> Transactions, select your desired criteria and click Submit.



3. Click Download to download the transaction history.



Convert from CSV to QFX

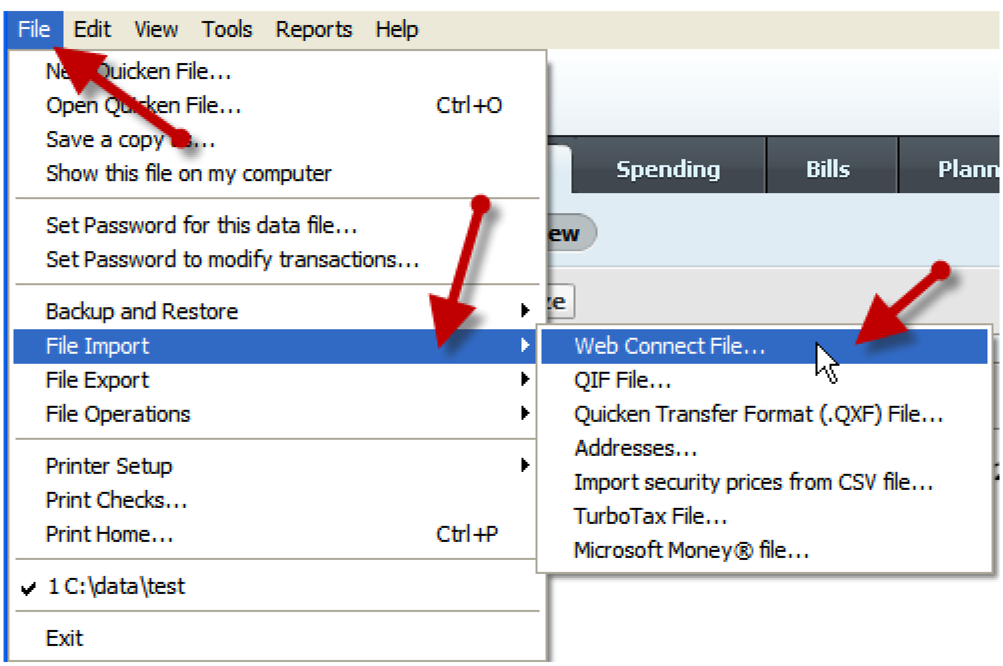
1. Download CSV2QFX at https://www.propersoft.net/download/csv2qfx and install it. You can test the converter with the free trial before purchasing a license. **Use promotion code RPG40 to receive a 40% discount when you purchase a CSV2QFX personal license.**

   This is a paid application developed by ProperSoft Inc. We are not affiliated with ProperSoft Inc, we are not responsible for the software and we do not provide product support for the converter.

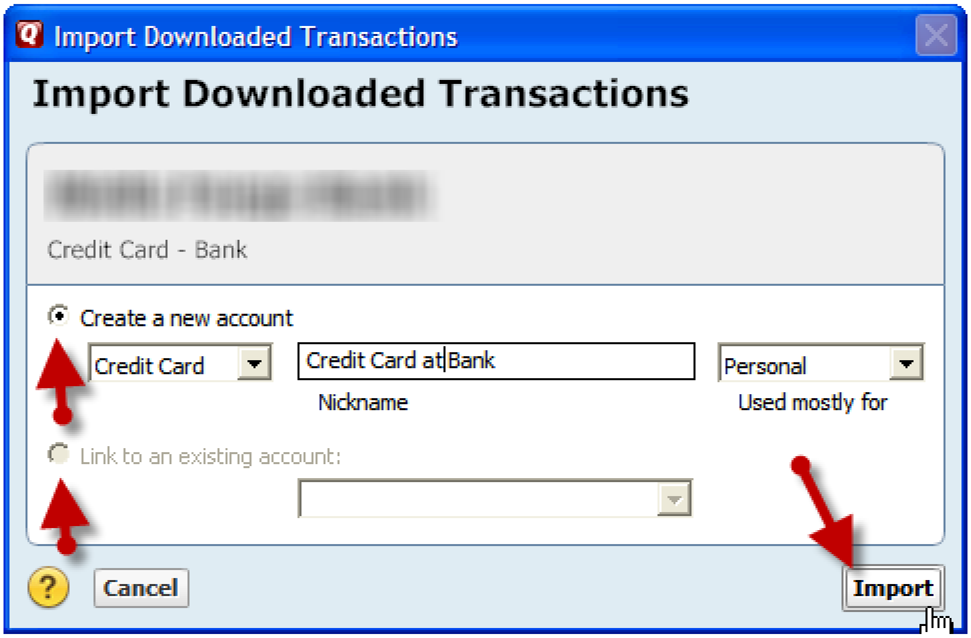
2. Start CSV2QFX and point to the CSV file (make sure it is not opened in Excel)
3. Enter the account ID as select the account type
4. Click the Convert button to create the QFX file
5. If the account in Quicken is connected to direct bank download, disable online services before importing a QFX file
6. Import the QFX file into Quicken as Web Connect file

Import QFX File to Quicken

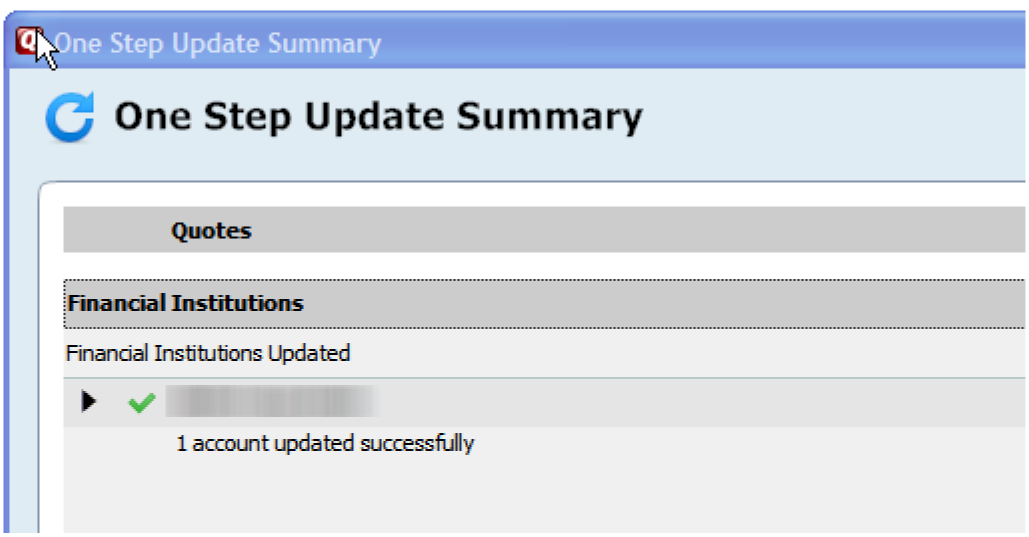
1. Start Quicken and click File, then File Import, then Web Connect file.



2. On the import screen, select existing account or create new account.



3. Confirm the account is updated (one time).



4. Review your imported transactions (Done!).