Quicken Investment Tracking

1) Quicken Investment Tracking

- With your account number(s) in hand, call TD Ameritrade at (800) 431-3500 Option 4 for technology with your account number(s) available. Request that your accounts be activated for Quicken Reporting
- Then open Quicken and select File and then New Quicken File in the upper left corner
- Select New Quicken Account and click OK
- Click on Brokerage under Investing & Retirement
- Choose TD Ameritrade for your financial institution
- Enter your 9-digit Account Number in the UserID/username box, your 4-digit Pin (last 4 digits of the social security number) number in the Password fields and click Connect
- Click Next in the lower right
- Possibly give the account a Nickname and select Next
- Quicken should then identify the account and then you will select Finish
- You will then have to select the red flagged account on the left side of Quicken on the account list to open a window and accept all the transactions
- After all transactions have been accepted, you will be prompted to enter your current cash balance, and select Done

If you experience any issues linking your account, call TD Ameritrade at (800) 431-3500 Option 4 for technology.

If you have any questions, please contact our helpful staff.