William Blair

My William Blair Quicken Downloads

Downloading transactions to Quicken from My William Blair

| Step One Click on the menu item Accounts located at the top of the screen. | <i>William Blair</i> My William Blair | FIND (Accounts | S REPORTS DOCUMENTS AR - DEMO (DEMO-B3000, Roth IRA) | |
|--|--|----------------|---|--|
| Step Two Click on the box next to the account you want to download. A checkmark will appear in the box. | William Blair My William Blair ACTIONS > Accounts and Groups | FILTER RESET | S REPORTS DOC | |
| | Account Name 🔺 | | Account Number | |
| | ALL DEMO FAMILY HOLDINGS - DEMO | GOG 🗠 🗠 🗸 | | |
| | GARFUNKEL ASSOCIATES - DEMO | i | DEMO-A1000 | |
| | | | | |

Step Three

Click on the dropdown box shaded in blue labeled **ACTIONS** located in the upper-left-hand corner of the screen and select **Download to Quicken.**

| <i>William Blair</i> My William Blair | ACCOUNTS | REPORTS DOCL |
|---|--------------|----------------|
| ACTIONS V Accounts and Groups V | FILTER RESET | |
| Export Data | | |
| Download to Quicken® | | Account Number |
| ALL DEMO FAMILY HOLDINGS - DEMO | 50G 📥 🗸 | |
| GARFUNKEL ASSOCIATES - DEMO | M V | DEMO-A1000 |
| JAMAR FAMILY FOUNDATION - DEMO | в 🖿 🗸 | |