

How do I email my financial institution?

About emailing your financial institution

Contact your financial institution directly if you have questions about your downloaded transactions or about any of your holdings and balances (for investment accounts). You can call your financial institution, or you can send email from the **Online Center** (if your financial institution supports the email feature).

1. Choose **Tools** menu > **Online Center**.
2. Select the applicable **Financial Institution** (the one you want to contact or from which you received email).
3. If the **Email** option is available, you will see the option on the screen.



If no email option is available, it is because the bank has not provided the email to Quicken.

To create email

- On the **Email** tab, click **Create**.
- Select **Email** about online account.
- Click **OK**.
- Enter the appropriate information.
- Click **OK**.
- The message is added to the list of instructions to send and to the email status list.

To read email

- Select the email message you want to read.
- On the **Email** tab, click **Read**.
- Click **Print** to print this message. (Optional)

To delete email

- On the **Email** tab, select the email message you want to delete.
- Click **Delete**.

Notes

To send email about a specific online payment, [make a payment inquiry](#).



Note for our Canadian Customers

The following terms will be different in the Canadian releases of Quicken.

Canada: "Cheque" / United States: "Check"
Canada: "Colour" / United States: "Color"
Canada: "Centre" / United States: "Center"
Canada: "Realise" / United States: "Realize"
Canada: "Behaviour" / United States: "Behavior"
Canada: "Analyse" / United States: "Analyze"