

Special investment accounts

- [How do I decide how to track a 401\(k\)/403\(b\) account?](#)
- [How do I add a 401\(k\)/403\(b\) account?](#)
- [Mark an account as tax deferred](#)
- [How do I add an IRA-type account \(traditional IRA, Roth IRA, Education IRA, SEP-IRA, SIMPLE, or Keogh plan\)?](#)
- [How do I add a 529 plan?](#)
- [How do I add a single mutual fund investment account?](#)
- [How do I add an account to track employee stock purchase plan \(ESPP\) shares?](#)
- [How do I add an employee stock option grant \(ESOG\)?](#)