

Invest for the future

Quicken combines data from all your investment accounts, no matter how many different financial institutions and plan administrators you have. Simply create a Quicken account for each of your real-world investment accounts, and then use the powerful research and analysis tools to examine all your investments in one place. The **Investing tab**, **Portfolio**, **Portfolio Analyzer**, **Security List**, and investment reports provide news, fundamentals, performance, history, and analysis. Perhaps just as importantly, you can create a personalized asset allocation target that includes all your accounts together, and then monitor and rebalance as necessary. The **Portfolio X-Ray** feature analyzes deep into mutual funds, ETF's, and other equity funds to reveal your true exposure in individual equities, including those in your mutual funds.

Keeping your records up to date is simple using the **Enter Transaction** dialogs. Better still, sign up for online account services with Quicken and simply update transactions, balances, and holdings directly from your participating financial institution (Internet access required).

You can also evaluate your holdings, research potential investments, download stock quotes, and historical prices. You can have Quicken alert you about important news about the securities in your portfolio or **Watch List** (Internet access required).

Quicken records the purchase dates and prices when you enter or download transactions, so you don't need to search for old brokerage statements to identify lots and calculate tax liability when you sell. Just tell Quicken how you want to handle the sale—**First Shares In**, **Last Shares In**, **Minimum Gain**, or **Maximum Gain**. The **Capital Gains Estimator** can help you optimize security sales to realize the greatest after-tax yield. And the capital gains report can save you hours at tax time.



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"

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