

How do I convert a brokerage account to a 401(k) or IRA account?

If you have been tracking your 401(k) or IRA in a Quicken brokerage account, you can easily convert it to a Quicken 401(k) or IRA account. Doing so will more accurately identify the purpose of the account in Quicken, and assure that its tax-deferred status is represented correctly in Quicken reports and graphs.

1. Choose **Tools** menu > **Account List**.
2. Click the **Edit** button next to the brokerage account that you want to convert.
3. If necessary, in the **Account Details** dialog change **Tax Deferred Status** to **Yes**, and **Show cash in a checking account** to **No**.
4. Click the **Convert to a 401(k) or IRA** button.

Note: This button displays in the Account Details dialog only for brokerage accounts with the settings described in step 3, above.