

Merging securities

Why merge securities?

You might need to merge two securities for the following reasons:

- **Eliminate duplicate entries:** Merge securities when you have duplicate entries in your security list. This will eliminate the duplicate. If you have more than two entries for the same security, merge two at a time until you have one entry for the security.
- **Handle symbol changes:** If a security you own changed its ticker symbol, this could result in two securities. In this case, you could merge the securities to maintain a single holding and price history. Ensure that you select the new ticker when you merge.



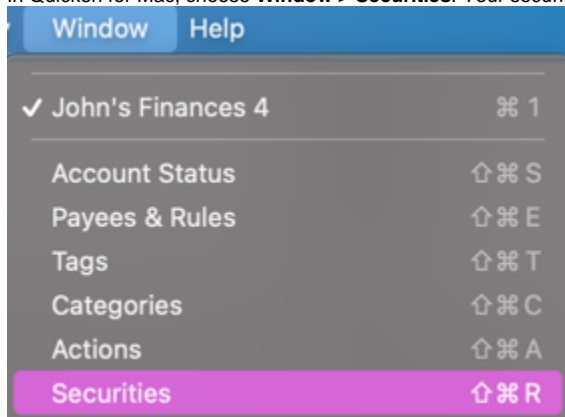
You can only merge 2 securities at a time. If you have more than two that you need to merge, just repeat this process to merge the additional securities.

What happens after merging?

All existing transactions associated with the securities you merge will share the same symbol, security name, and price history.

To merge securities

1. In Quicken for Mac, choose **Window > Securities**. Your security list is displayed.



2. Select the two securities that you'd like to merge. To select two securities, select the first security, then hold down the **Command** (⌘) key and select the second security.



Some securities of different types cannot be merged (a bond and a stock, for example). When attempting to correct an error where the wrong security type was applied to a transaction, we recommend that you correct the transaction itself by editing and choosing the correct security, instead of merging.

3. Click the **Merge Securities** button.
4. On the **Merge Securities** window, click **Merge** to complete the action.
5. If the securities you are merging have different details (such as a different spelling or capitalization of the security name or a different ticker), you will be prompted to select the preferred details before the merge.