

# Setting up investment accounts

## To set up an investment account:

1. In Quicken, choose **Accounts > New > Investments**, then select the type of investment account you want to create.
2. Enter the name of your brokerage in the **Search** field, select it from the list, and click **Continue**.
3. Follow the on-screen instructions to set up your account, including connecting to your bank so you can download your holdings, transactions and balances directly into Quicken.
  - Quicken supports downloads with over 14,500 financial institutions. If you can't find yours in the list, try these two steps:
    - a. Click "My bank is not in the list" in the Add Account window, and then click the **Refresh** button on the My Bank is Not in the List message. Quicken updates your list of supported financial institutions. Next, click **Check list** again, and try once more to find your bank in the list of supported institutions.
    - b. If your bank still does not appear in the list, you can still create an account in Quicken, but you won't be able to download transactions into it. Instead, you will need to enter your transactions by hand. To set up a manual account, click "My bank is not in the list" in the Add Account window, and then click **Add Manual Account**.