FIRST REPUBLIC BANK

Quicken for Mac 2007 - Direct Connect

The following instructions are provided by Quicken for clients who use these services. To ensure the service continues to operate properly after your upgrade to the new First Republic digital banking experience, we ask that you please follow the steps below. We greatly appreciate your understanding.

Upgrade Instructions

As you upgrade to the new digital banking experience, you will need to modify your Quicken settings to ensure a smooth transition of your data. To complete these instructions, you will need your First Republic username and password.

NOTE:	It is important that you perform the following instructions exactly as described and in the order presented. Otherwise, your service may stop functioning properly. This should take 15–30 minutes.
	Bill Pay within Quicken is not currently supported by First Republic - Digital Banking. If you use Bill Pay within Quicken, please contact Banking Online Support at (855) 886-4819 for assistance.

Documentation and Procedures

Task 1: Preparation

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1. To ensure your data remains intact, please back up your data file. For instructions to back up your data file, choose **Help** menu > **Search**. Search for "Backing Up" then select **Backing up data files**, and follow the instructions.

2. Once the backup is complete, please download the latest Quicken update. For instructions to download an update, choose **Help** menu > **Search**. Search for "Updates" then select **Check for Updates**, and follow the instructions.

Task 2: Once you have upgraded to the new digital banking experience, deactivate your account(s) labeled **First Republic Bank - Legacy** within Quicken.

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1. Choose **Lists** menu > **Accounts**.

2. Select the account that you want to disable and click **Edit**.

3. Write down your account information (account number, routing number and customer ID).

NOTE: You will need this information to re-enable your account.

4. If you use online payment services, then select **Not Enabled** in the **Pay Bills Online** drop-down list. Follow the prompts to confirm the deactivation.

1. In the **Download Transactions** drop-down list, select **Not Enabled**. Follow the prompts to confirm the deactivation.

2. Remove the information within the **Account Number** and **Routing Number** fields.

3. Click **OK** to save your edits.

4. Repeat steps for each account to be disconnected.

5. Verify your account list does not display a blue online circle icon for any accounts at **First Republic Bank.**

Task 3:   Reactivate your account(s) at **First Republic Bank**

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1. Choose **Lists** menu > **Accounts**.

2. Select your first disabled account and click **Edit**.

3. Click the **Financial Institution** drop-down list and select **Change Financial Institution**.

4. Click on **Update List**.

5. In the **Financial Institutions** dialog box, click **Enter**, then select **First Republic Bank** from the list and click **Use**.

6. Enter your **User ID** and **Password**. Click **OK**.

NOTE: If you were assigned a First Republic Quicken access code, that code no longer applies. Please use your First Republic Digital Banking password in Quicken going forward.

7. In the **Add Online Services** dialog box, match your first account to the appropriate account number. Click **OK**.

NOTE:	Each account will be displayed below "Use an existing account."

8. Click **OK**.

9. Click **OK** to close the **Edit Register** page.

10. Choose **Lists** menu > **Accounts**. Verify that each account you are reactivating has a blue online circle for online services.

Thank you for making these important changes.

Please contact Banking Online Support at (855) 886-4819 for assistance.