



FIRST REPUBLIC BANK

# Quicken for Windows 2013-2016 – Express Web Connect

The following instructions are provided by Quicken for clients who use these services. To ensure the service continues to operate properly after your conversion 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 online banking 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 conversion should take 15– 30 minutes.

## Documentation and Procedures

---

### Task 1: Upgrade Preparation

---

1. To ensure your data remains intact, please back up your data file. For instructions on how to do this, please choose the **Help** menu > **Quicken Help**. Search for “**Backup Data File**” and follow the instructions.
2. Once the backup is complete, please download the latest Quicken update. For instructions to download an update, choose the **Quicken Help**. Search for “**Update Software**” and follow the instructions.

### Task 2: Deactivate Your Account(s) labeled **First Republic Bank** within Quicken

---

1. Choose **Tools** menu > **Account List**.
2. Click the **Edit** button of the account you want to deactivate.
3. In the **Account Details** dialog, click on the **Online Services** tab.
4. Click **Deactivate**. Follow the prompts to confirm the deactivation.
5. Click on the **General** tab.
6. Remove the First Republic name and account number. Click **OK** to close the window
7. Repeat steps 2—6 for each account to be deactivated.



---

**Task 3:** Re-activate Your Accounts at First Republic – Digital Banking

---

1. Choose **Tools** menu > **Account List**.
2. Click the **Edit** button of the account you want to activate.
3. In the Account Details dialog, click on the **Online Services** tab.
4. Click **Set up Now**.
5. Use **Advanced Setup** to activate your account.
6. Enter **First Republic – Digital Banking** and click **Next**.
7. If presented with the Select Connection Method screen, select **Express Web Connect**.
8. Enter your **Username** and **Password**. Click **Connect**.

**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.

**NOTE:** You may be presented with a security question from First Republic prior to receiving your accounts.

9. Ensure you associate the account to the appropriate account already listed in Quicken. You will want to select Link to an existing account and select the matching accounts in the drop-down menu.

**IMPORTANT:** Do **NOT** select Add to Quicken unless you intend to add a new account to Quicken. If you are presented with accounts you do not want to track in this data file, select **Ignore – Don't Download into Quicken**.

10. After all accounts have been matched, click **Next**. You will receive confirmation that your accounts have been added.
11. Click **Done** or **Finish**.

Thank you for making these important changes!

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