Quicken for Mac Conversion Instructions
[Quicken for Mac 2005 - 2007 Web Connect to Web Connect]

As CenterPointe Community Bank completes its system conversion, you will need to modify your Quicken settings to ensure the smooth transition of your data. You will need your customer ID and password for the CenterPointe Community Bank website.

It is important that you perform the following instructions exactly as described and in the order presented. If you do not, your service may stop functioning properly. This conversion should take 15–30 minutes.

This update is time sensitive and can be completed on or after Monday, August 6, 2012

Connect to CenterPointe Community Bank

1. Choose **Online** menu → **Download Transactions…**
2. Select your account from the drop-down list.
3. Click **Download** to access CenterPointe Community Bank website at www.centerpointebank.com.
4. Enter your customer ID and password to login to the CenterPointe Community Bank web site. Download your transactions through August 2, 2012 into Quicken.
5. Repeat the download process for each account you have at CenterPointe Community Bank (such as checking, savings, credit cards and brokerage).
6. Once all accounts have been downloaded, accept all transactions into your Quicken account registers.

Conversion Preparation

1. Backup your data file. For instructions to back up your data file, choose **Help** menu → **Search**. Search for and select "Backing Up Your Data" and follow the instructions.
2. Download the latest Quicken update. For instructions to download an update, choose **Help** menu → **Search**. Search for and select "Checking for updates to Quicken" and follow the instructions.

Deactivate Your Account(s)

1. Choose **Lists** menu → **Accounts**.
2. Select the account that you want to disable and click **Edit**.
3. In the Download Transactions drop-down list, select **Not Enabled**. Follow the prompts to confirm the deactivation.
4. Delete the information within the Account Number and Routing Number fields.
5. Click **OK** to save your edits.
6. Repeat steps 2 – 6 for each account at CenterPointe Community Bank.
7. Verify that your account list does not display a blue online circle icon for any accounts at CenterPointe Community Bank.

Re-Activate Your Account(s) at CenterPointe Community Bank

1. Log into the CenterPointe Community Bank website at www.centerpointebank.com
2. Download your transactions to Quicken.
3. Click the **Use an existing account** radio button.
4. Select the corresponding existing Quicken account in the drop-down list and click **OK**.

5. Repeat steps 2 – 4 for all accounts at CenterPointe Community Bank.

Choose **Lists** menu → **Accounts.** Verify that each account at CenterPointe Community Bank has a blue online circle indicating that it has been reactivated for online services.

Thank you for making these important changes!