

Linking Your Retirement Account to Quicken®

To take advantage of our enhanced download capabilities, simply follow the steps outlined below to set up access for your ING account. On your Quicken desktop, you will need to delete your original account set up under ING Financial Advisors, LLC and add a new account under ING Institutional Plan Services. (If you did not previously have an account set up under ING Financial Advisors, LLC, please disregard Step 1 below.) Should you have questions regarding the deletion or setup procedures, you can use the program's Help feature.

STEP 1 – REMOVE YOUR ORIGINAL ACCOUNT (ING Financial Advisors, LLC)

We recommend that you backup your ING Financial Advisors, LLC Quicken account prior to deletion. To backup your account, on the Quicken start-up screen, click on **File**, then **Backup** and follow the instructions on the screen.

To delete your ING Financial Advisors, LLC account:

- On the Quicken start-up screen, click on **Investing**, then **Investing Accounts**, then **Account List**.
- Click on your ING Financial Advisors, LLC account and click on **Delete**.
- A message box will be presented **"Are you sure you want to delete this account?"** Type **"yes"** to confirm.
- Enter **yes** in the box and click **OK**.
- A message box will be presented **"You are about to delete setup information for an online account."** Click **OK**. Your screen will refresh and your ING Financial Advisors, LLC account will no longer be displayed.
- Proceed to Steps 2 – 5 to add your new account.

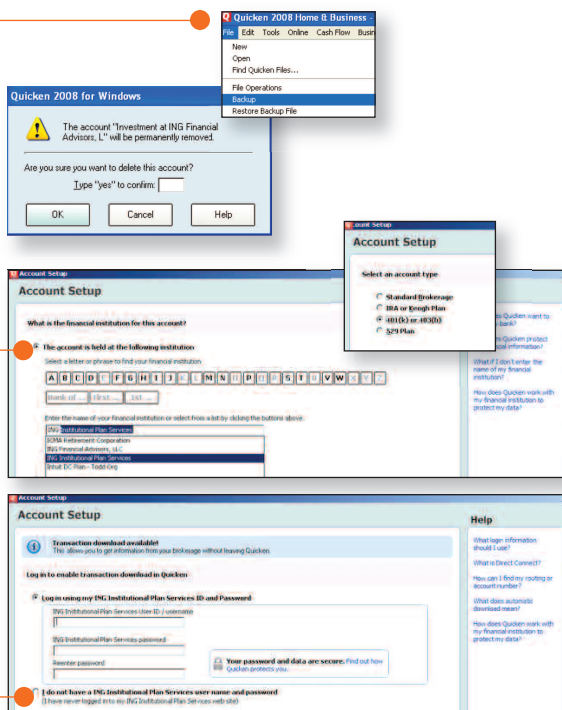
Note: after adding your new account, you may wish to update your Security List to remove the securities for the ING Financial Advisors, LLC account. Click on **Investing**, then **Security List** and delete the original account's securities.

STEP 2 – ADD NEW ACCOUNT (ING Institutional Plan Services)

- At the Quicken start-up screen on your desktop, click on **Investing**, then **Investing Accounts** and then **Add Account**.
- At the prompts, select **ING Institutional Plan Services** from the list, then **401(k) and 403(b) retirement plans**.
- Enter your choice for a name for your plan account.
- Click on the setup method you want to use – **Online (recommended)** or **Manual**. To keep going, click on **Next**.

STEP 3 – IDENTIFY YOURSELF

- Enter your **SocialSecurityNumber@ingmssb**, for example 123456789@ingmssb.
- Enter the same **PIN²** you use to access your plan account over the phone through the IVR system. To keep going, click on **Next**.



- 1 If you don't already have Quicken® on your computer, you can go to <http://www.intuit.com/> to purchase and download the software.
- 2 Your PIN is initially set as the 4-digit month and year of your birth (MMYY). For example, if you were born in January, 1972, your PIN would be 0172. If you forget your PIN, call the Customer Contact Center.



Your future. Made easier.®

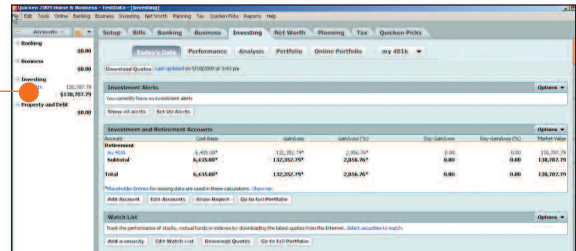
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STEP 4 – SELECT PLAN ACCOUNTS

- Click on the **name** of the first plan account you want to download. To keep going, click on **Next**.
- Click on the **names** of additional plan accounts to download. Enter your choice for a name for each additional plan account. To keep going, click on **Next**.
- The screen displays your **account set-up**. To confirm the information, click on **Next**.

STEP 5 – DOWNLOAD COMPLETE

- The program downloads and registers the information from your plan account(s) and displays it.
- Next time you use the program, you can update your plan account information with the latest transactions and balances – with a single click of the mouse!



To learn more about the application's features and benefits, access the help menu within the software. For questions about your Plan, or to speak with a Customer Service Associate call 1-800-584-6001.

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[HTTP://ING.US](http://ing.us)