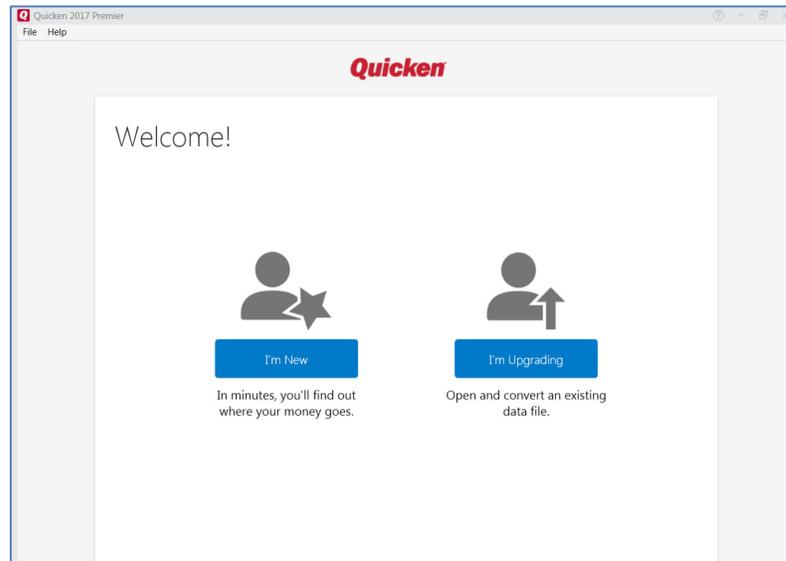
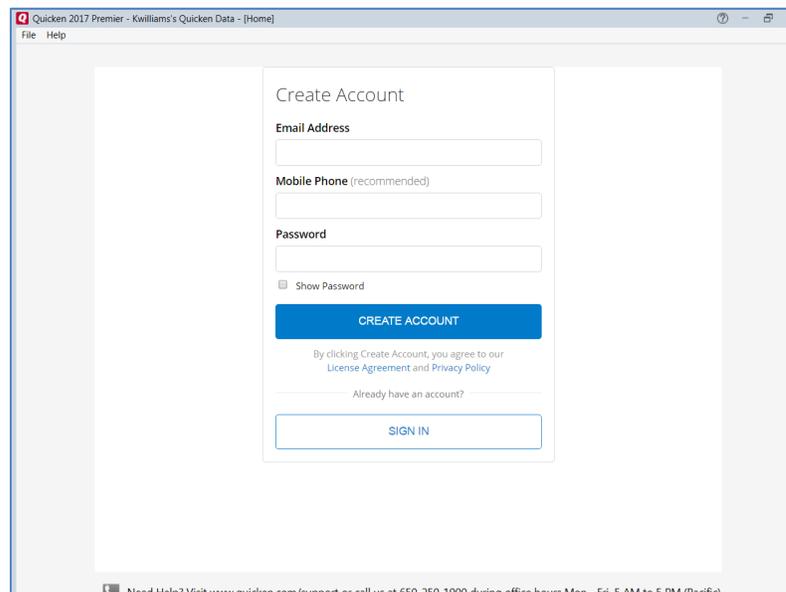


# Quicken Direct Connect (2020)

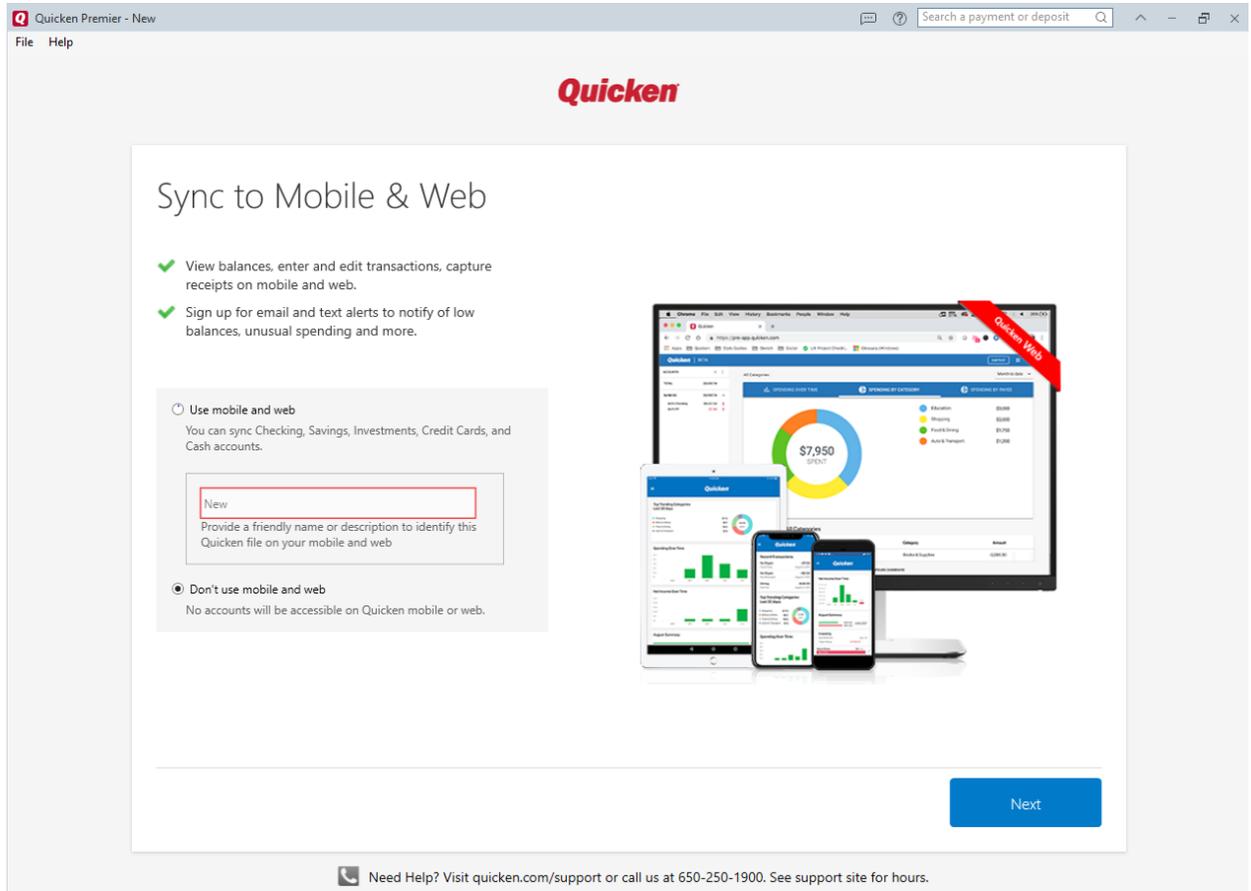
1. If you do not already have Quicken® or you are upgrading versions, Open Quicken® and select applicable option. If you already have Quicken® and you are signed into it, you will start at **Step 4**.



2. If you do not have a Quicken account, you will need to create one. If you do have an account, please sign in.



3. If offered the option to sync to mobile devices, you may choose **Use and Mobile and Web** or **Don't Use Mobile and Web** and select **Next**.



4. You are now ready to add your accounts. **Click Add Account.**

The screenshot shows the Quicken Premier software interface. At the top, the title bar reads "Quicken Premier - New" and the menu bar includes "File" and "Help". A search bar in the top right corner contains the text "Search a payment or deposit". The main content area features the Quicken logo in red. Below the logo, the word "Success!" is displayed in green. A message states, "You are ready to use Quicken. Your Quicken ID is". Under the heading "What's new in Quicken", there are two green checkmarks: "Access Quicken using a web browser and manage your money anywhere." and "Free Quicken Bill Pay and priority access to Quicken phone support (Premier and above).". To the right of the text is an illustration of a desktop computer monitor displaying a dashboard with a pie chart, a tablet, a smartphone, and a mouse. Below this illustration, the text "Next: Add all your accounts" is followed by "Add saving, credit cards, checking, brokerage or any account so you can get your complete financial picture." and a blue "Add Account" button. At the bottom of the window, a help icon and text read: "Need Help? Visit [quicken.com/support](https://quicken.com/support) or call us at 650-250-1900. See support site for hours."

5. Search for your financial institution.

**Add Account** ×

### Search for your financial institution

Add your Savings, Checking, Credit Card, Brokerage, and Loan accounts ⓘ

*Search from 14000+ supported institutions* 🔍

Or select from popular institutions


Connected Account    + Offline Account    + Other Assets & Liabilities

? Cancel

6. Type **Pinnacle Financial Partners** in to locate our bank.

Q Add Account ×

### Search for your financial institution

Add your Savings, Checking, Credit Card, Brokerage, and Loan accounts ⓘ

Pinnacle Financial Partners ×

**Other results**

Pinnacle Financial Partners



Pinnacle Financial Partners

1-866-404-6143  
[www.pnfp.com](http://www.pnfp.com)

[Advanced Options](#)

? Cancel

Back Next

7. Input your Access ID and Password for Pinnacle Online Banking and **Click Connect**.

**Add Account**

**Pinnacle Financial Partners**  
www.pnfp.com | Tel: 1-866-404-6143

Protecting your financial information is critical to us.  
[Learn more...](#)

Sign in to connect your accounts to Quicken

**Internet Banking Access ID**  
for your online Pinnacle Financial Partners account

**Internet Banking Passcode**  
for your online Pinnacle Financial Partners account

 Show

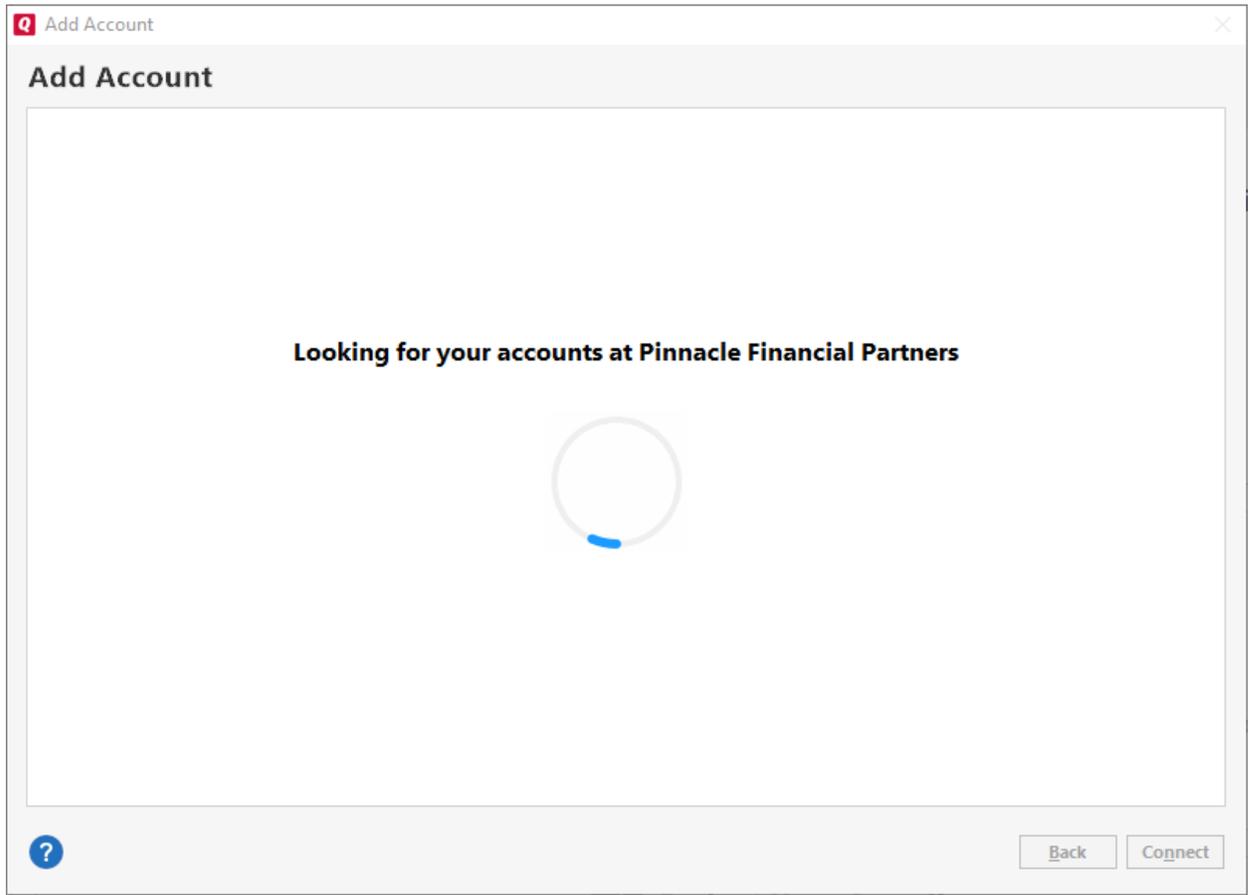
Save to password vault ?

Go to [www.pnfp.com](http://www.pnfp.com) to enroll.

? Cancel Advanced Options Back Connect

\* Note- If connection fails, you will need to sign into Pnfp.com; there will be a message waiting to approve personal financial software access. Follow the links in the message to enable and confirm access.

8. Looking for your accounts at Pinnacle Financial Partners.



9. Once completed the screen will display and confirm all accounts added. **Select Add Another Account or Finish.**

Accounts Added

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**Pinnacle Financial Partners**  
www.pnfp.com | Tel: 1-866-404-6143

Protecting your financial information is critical to us.  
[Learn more...](#)

Accounts

- ✓ **Daisys Account**  
Downloaded and categorized transactions from the last 76 days.
- ✓ **analysis**  
Downloaded and categorized transactions from the last 29 days.

Most financial institutions provide the most recent 90 days of your transactions, but this number can vary based on financial institution policy.

[Add Another Account](#) [Finish](#)