

Linking your retirement account to Quicken®



You can now download your ADP TotalSource Retirement Savings Plan (the “Plan”) account information to the popular personal financial management software package Quicken. At your command, an automated link feeds current, accurate data – including balances and transactions – to Quicken¹. With this time saving capability, you can plan and make decisions viewing all your investment information at once. To download Plan account information to Quicken, follow the steps below. If you have questions about setup procedures, you can use the program’s Help feature.

Step 1 – Add new account

- Launch the Quicken software from your computer or other device.
- From the top menu, select **Tools**, Add Account or click on Add Account “+” icon next to the **ACCOUNTS** bar at the top left of your screen.
- At the next prompt, enter the name “Voya” in the search box and Quicken will filter results. Select **Voya Institutional Plan Services** from the search results list.
- Click **Next** to continue.

Step 2 – Sign in to connect your account

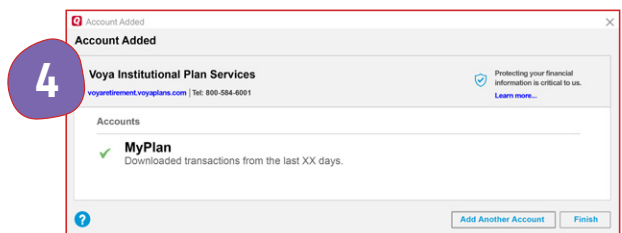
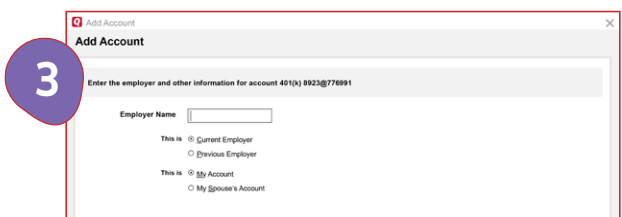
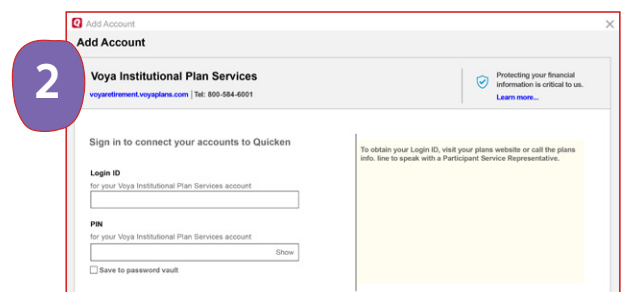
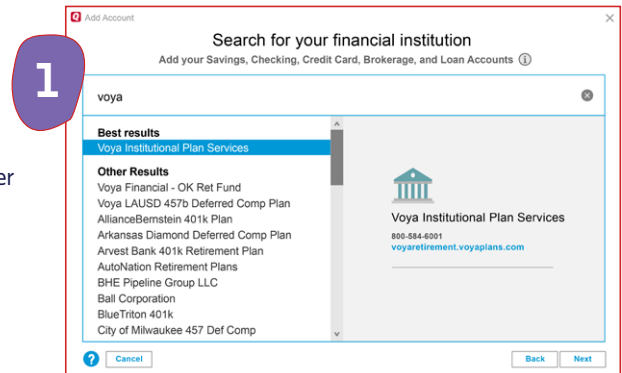
- For login ID, enter the username you use when accessing your ADP TotalSource Retirement Savings Plan account at Voya. **IMPORTANT: Add the extension @adp to your username. For example, Username@adp.**
- For the PIN, enter the **Password** you use when accessing your ADP TotalSource Retirement Savings Plan account at Voya. If you forgot your password, you may request a new password from the “Forgot your password” link on the login page of the Voya website.
- Click **Connect** to continue.

Step 3 – Enter other information

- **NOTE:** If you have more than one account associated with the username and password you entered, you will be prompted to select the name of the plan account you want to download to Quicken after completing **Step 2** above.
- Next, enter the Employer Name and other information for the account selected as prompted.
- Click **Next** to continue.

Step 4 – Download Complete

- Quicken downloads and registers the information from your plan account(s) and displays it.
- Click **Finish**.
- Next time you use Quicken, you can update your Plan account information with the latest transactions and balances using Quicken’s plan update features.



ADP TotalSource® Retirement Savings Plan • (855) 646-7549 • <https://adptotalsource.voya.com>

1. If you don't already have Quicken on your computer, you can go to www.quicken.com to purchase and download the software.
2. If you forgot your Password, call the Plan Service Center or visit your Plan website.

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