

# Investment accounts

## Tell me about adding investing accounts

Unlike financial portals or brokerage websites, Quicken helps you track all your investments in one place—including the tax implications. See [Add an investment account](#) for more information.

### Which investing accounts should I add?

Quicken account	Real-world account
<b>Brokerage</b>	<b>Most investment account types</b> A brokerage account can hold one or more securities (such as stocks, bonds, or mutual funds), with or without an associated cash management or money market fund (sometimes called a "sweep" fund).  <b>Employee stock plans</b> Use a brokerage account type to track Employee Stock Option Grants (ESOG) and Employee Stock Purchase Plans (ESPP). To simplify record keeping, we recommend tracking each of these in a dedicated account. Add a brokerage account, and then use the <a href="#">appropriate procedures</a> to enter the grant and exercise transactions or buy and sell ESPP shares.  <b>Other</b> You can use the Brokerage account type to track any security with a fluctuating value, for which you want to track performance, income, capital gains, or tax implications. Use this account type to track variable or fixed annuities, real estate investment trusts (REITS) or partnerships, and unit trusts. Just add the appropriate <a href="#">number of shares</a> and <a href="#">price</a> , and then periodically <a href="#">update the security price</a> .
<b>401(k)/403(b)</b>	<b>401(k) or 403(b) accounts</b> Use the 401(k)/403(b) account type to track employer-sponsored retirement plans. Contributions to these accounts are tax-deferred, and your employer may make matching contributions. Quicken can track your holdings whether or not your statement reports transaction-level detail or the exact number of shares you own.
<b>IRA or Keogh plan</b>	<b>Individual Retirement Accounts and IRA-type accounts</b> Quicken lets you specify the type: <ul style="list-style-type: none"><li>• Traditional</li><li>• Roth</li><li>• SEP-IRA</li><li>• SIMPLE IRA</li><li>• Education IRA</li><li>• Coverdell ESA</li><li>• Keogh plan</li></ul>
<b>529 plan</b>	<b>529 plan accounts</b> Use the 529 plan account type to track your education savings account. When you add a 529 plan to Quicken, Quicken automatically marks the account as tax-deferred.
<b>Single mutual fund</b>	A fund you purchase directly from the mutual fund company. The <a href="#">single mutual fund account type</a> is only for funds that meet these three conditions: <ul style="list-style-type: none"><li>• You buy the fund directly from the mutual fund company</li><li>• Your account has no cash balance—any funds you contribute are automatically used to purchase shares; any dividends you receive are either sent to you or automatically reinvested</li><li>• If you buy another fund, the mutual fund company requires you to open a separate account</li></ul>