

# About updating investment account statements

Connecting with your participating broker or other financial institution to update transactions and balances is the easiest way to keep your investment accounts up to date. Once you record historical transactions for any securities you owned before you bought Quicken, you may never have to manually enter another investment transaction. To get started, simply sign up for [online account services with your broker or other participating financial institution](#).

## What can I do?

- [Tell me about how Quicken matches investment transactions](#)
- [Update investment transactions, balances, and holdings](#)
- [Review and accept investment transactions I've downloaded](#)
- [How do I edit and delete downloaded investment transactions?](#)
- [How do I compare my broker's downloaded holdings to my Quicken portfolio?](#)
- [How do I enter adjustments to my Quicken Portfolio to match your broker's online holdings information?](#)
- [How do I download a stock split?](#)

## What do I need to know before getting started?

Do not download the following types of transactions:

- [Employee stock option exercise transactions](#)
- [Employee stock purchase plan transactions](#)

## Where can I get more information?

- To learn more about entering historical transactions, see [Decide how much historical data to enter](#) and [Entering investment transactions manually](#).
- To view general information about working with online account services once you've set up your account, see [Downloading transactions for my accounts](#).
- If you regularly download transactions from several financial institutions using [One Step Update](#), Quicken's [Password Vault](#) feature is a secure, convenient way to manage the different passwords involved.