Tracking and updating a 401(k)/403(b) account

After you've created your 401(k) account, there are several ways to keep it up to date, depending on the kind of Quicken account you've set up.

Depending on your situation, you may also need to handle 401(k)-related events and charges such as rollovers and 401(k) matching.

What can I do to update a 401(k)/403(b) account?

- How do I use the 401(k) Update wizard?
- How do I update 401(k) transactions directly from my financial institution?
- How do I manually enter 401(k) transactions?
- How do I see a summary of my 401(k) information?
- How do I roll over a 401(k) account?
- How do I add a new security to my 401(k) portfolio?
- Record a transfer of funds
- How do I record maintenance fees if I don't use the 401(k) Update wizard?
- How do I track my employer's 401(k) matching contribution if I haven't set up my paycheck?
- How do I enter 401(k) catchup contributions?
- How do I record a 401(k) distribution?