



Getting Started with Accounts, Bills, and Paychecks

Setting up accounts in Microsoft Money 2007

Money 2007 lets you set up accounts for your bank, brokerage, and credit card as well as assets such as your home, vehicles, and employee stock options. Money 2007 stores these accounts in one convenient place, so you can easily stay on top of your balances and valued assets.

Add your account information

To set up your accounts in Microsoft Money 2007, have the following information handy:

- The name of your bank, brokerage, or credit card company.
- Your online sign-in information from your bank, brokerage, or credit card company.

If you don't have your sign-in information, you can still add your accounts. When you have your sign-in name and password from your financial institution you can update them online at that time.

To set up an account:

1. Click **Banking**.
2. From within the left hand pane click **Add a new account**.
3. Choose the account type (as shown in Figure 4-1), and then click **Next**.
4. Select the name of your financial institution (*Citizens Bank-Mid-Atl Consumer* for personal Mid Atlantic accounts and *Citizens Bank-Mid-Atl-Business* for business accounts. *Citizens Bank New-Engl-Consumer* for personal New England accounts and *Citizens Bank-New-England-Business* for business accounts).
5. Depending on the type of account you are setting up, Money 2007 will walk you through additional questions to gather information about your account.

Choose an account type

Banking

Credit card

Investment

Bill payment service provider

Other account type (such as loan, asset, or watch accounts)

Next Cancel

Figure 4-1: Selecting an Account Type During New Account Setup

If you entered online sign-in information for your institution, you will be prompted to **Choose Account Update Settings**.

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