

Important Changes to Quicken and Quickbooks

As part of our upcoming transition to the WesBanco mobile and online banking platform on May 19, we wanted to share some important dates and action items you will need to be aware of for your Quicken and QuickBooks software to ensure a smooth transition.

Please review the Intuit Transition Instructions below in detail to determine the necessary steps and actions needed to complete the required changes for your specific software. Both PC and Mac instructions are included in each document.

The Transition Instructions reference action dates, which are outlined below:

First Action Date: May 16, 2025 at 3pm ET

A data file backup and a final transaction download should be completed by this date. Please make sure to complete the final download **BEFORE** this date since transaction history might not be available after the upgrade.

Second Action Date: May 19 2025 at 8am ET

This is the action date for the remaining steps on the conversion instructions. You will complete the deactivate/reactivate of your online banking connection to ensure that you get your current Quicken or QuickBooks accounts set up with the new connection.

Transition Instructions:

- Quicken
- QuickBooks Desktop
- QuickBooks Online

Intuit aggregation services may be interrupted for up to 3-5 business days. Users are encouraged to download a QFX/QBO file during this outage.

The following services may not work during the outage:

- Quicken Win/Mac Express Web Connect
- QuickBooks Online Express Web Connect

Please carefully review your downloaded transactions after completing the transition instructions to ensure no transactions were duplicated or missed on the register.