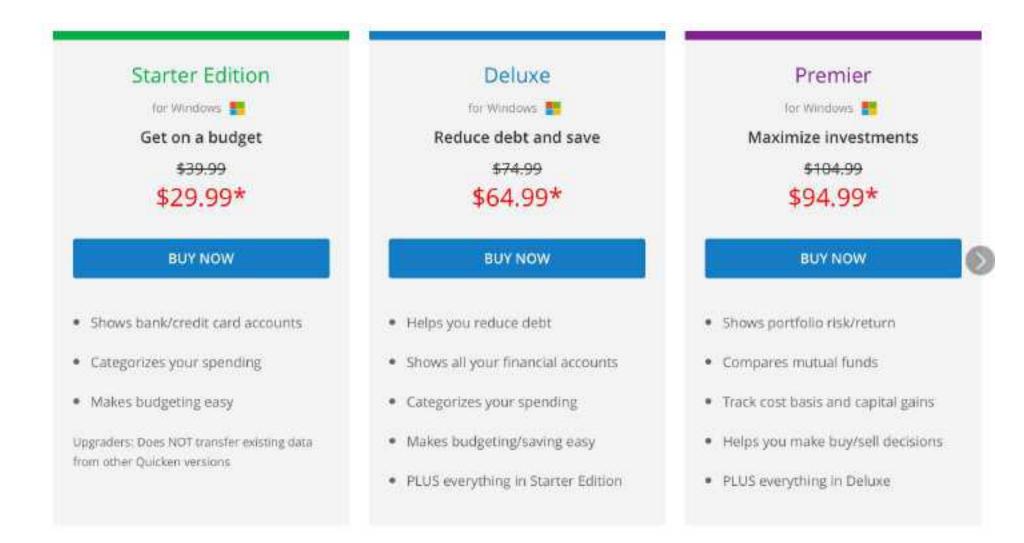
# Quicken and Mint

Jim Johnson

# Quicken for Windows



# Quicken 2016 for Mac

Features	Quicken 2016 for Mac	Quicken 2015 for Mac	Quicken 2007 for Mac	Quicken Premier (Windows) Burnow \$104.99
New Single-click conversion from Quicken Windows to Quicken for Mac 2016 <sup>1</sup>	*			
New Pay bills from Quicken*	~		~	-
New 12-month budget	~		*	-
New Portfolio time machine	~		~	*
New Transfer money between different accounts within your bank	~		~	~
Nsw Free phone support*	~		×	×
New Export category and tax reports to a csv file for use with your favorite spreadsheet	×.		~	-

# Review of Quicken for Mac



Review of: Quicken 2016 for Mac Reviewed by: Larry Ludwig Last modified: July 10, 2016

Summary: While a step up from previous versions, still falls short of the gold standard, Quicken for Windows. The introduction of Bill Pay for 2016 is a welcome addition. For some, Quicken for Mac might be a usable native OS X personal finance app.

Editor Rating

MORE DETAILS

One of the biggest news items last year in the personal finance space was Intuit finally releasing a new version of Quicken for Mac. The last time there was a true update for Quicken for Mac was in 2007. Quicken Essentials for Mac was released after that, but no one really takes it seriously.

For many Mac users who like using Quicken, it has been necessary to run VMware Fusion and use the Windows version. For the most part, Intuit was ignoring the Mac platform, and that's resulted in problems for Mac users who want to use Quicken.

# Missing Features

#### Features Missing Compared to Quicken for Windows

The Windows version is still Intuit's primary platform and gets all of the functionality. The Macintosh version is missing features such as:

- Debt Reduction Planner
- Customizable Portfolio View
- 12-Month Budget
- Automatically Link Online Bills to Quicken to See the Current Due Date and Amount Due (New for Windows 2016 Version)
- Free Credit Report
- Portfolio X-Ray

For some users of Quicken, these missing features make Quicken for Mac a nonstarter. To see exactly what's missing visit their web site.

One major sticking point with me is their investment reporting isn't as flexible as the Windows version. For someone like me who likes to track my investments in detail, this is a deal breaker, though it's slightly better than Banktivity's investment section. For some, the lack of investing functionality might not be a significant issue.

# Pros and Cons

#### Pros

- Bill Payment Now available in the Mac version.
- Native OS X App Quicken for Mac is built from scratch for the Apple Macintosh which allows the software to fully utilitize the features within OS X.
- Good Conversion If you are converting from other versions of Quicken the process is pretty painless.

#### Cons

- Unknown Future Intuit is selling Quicken and the future of the product is unknown.
- Missing Features Mac version lacks some important features compared to its Windows sibling.
- Weak Budgeting Functionality Budgeting is missing important features such as a 12-month budget.
- Expensive It is expensive compared to other personal finance software available for Macintosh.

# Mint

# Mint. It's all coming together.

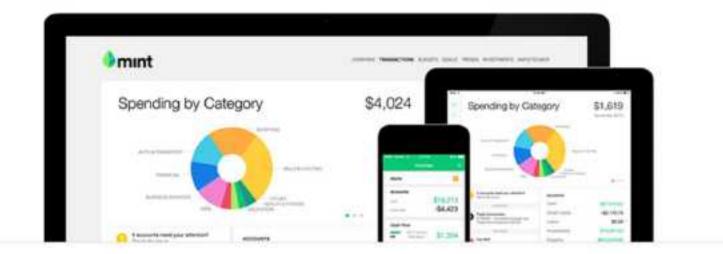
Mint makes managing your personal finances a cinch. Be the master of your money so you can get more out of life.

SIGN UP FREE

# Mint Basics

#### The complete picture in minutes

See all your balances and transactions together. Mint automatically pulls all your financial information into one place, so you can finally get the entire picture.



#### Your financial life, in one place and easy to understand.

We gather all your financial information into one place, giving you the whole picture in a way that's easy to understand and take advantage of. Add the accounts, cards and bills you'd like. See what you have and what you owe. Track your spending patterns, investments and more.

# Review of Mint



Mint is a FREE online personal finance (web 2.0) service similar to Quicken. Over the past several years I've taken mint.com for a test spin with my personal finances. With Mint you have no local software to install, and it's a service you can access with any browser or mobile device.

# Pros and Cons

#### Pros

- Bill Payment Now available in the Mac version.
- Native OS X App Quicken for Mac is built from scratch for the Apple Macintosh which allows the software to fully utilitize the features within OS X.
- Good Conversion If you are converting from other versions of Quicken the process is pretty painless.

#### **Cons**

- Unknown Future Intuit is selling Quicken and the future of the product is unknown.
- Missing Features Mac version lacks some important features compared to its Windows sibling.
- Weak Budgeting Functionality Budgeting is missing important features such as a 12-month budget.
- Expensive It is expensive compared to other personal finance software available for Macintosh.



# SEE Finance By Scimonoc Software

Jeff Jensen Skip Mundy

### Features

#### Features



Manage all of Your Finances: You can track all your Income,

Banking, Investment, Cash, Asset,

Loan, Credit Card, and Liability Accounts.



Comprehensive Investment Tracking & Monitoring: Monitor and track performance for

all of your stocks, mutual funds, bonds, options, and other securities.



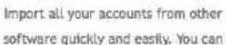
#### Custom Reports:

Keep track of all your financial information in reports you create for

your needs.



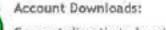
#### Import Accounts:



Import all your accounts from other

easily import data found in QIF, QMTF, CSV, QFX and OFX files.





Connect directly to hundreds of

financial institutions and import data

from thousands of others.



Loan Tracking: Keep track of all your outstanding

loans. View and change current.

amortization schedules.

#### Custom Budgets:

Track your spending and stay on top

of your budget. Create custom

budgets monitoring where and how you spend your money.

Transaction Filters:

Setting up transaction filters puts an

end to repetitive transaction entry and editing of new, imported and downloaded transactions.



Multiple Currencies:

Work with different currencies in different accounts and update

exchange rates at any time. Over 150 currencies available.



#### Secured Data:

Files can be password protected and all sensitive account information,

such as account login credentials, is saved in Apple's Keychain.



#### Interactive Graphs:

Graphs throughout SEE Finance

offer the ability to interact and show

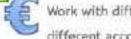
more detailed information.



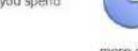
More and More Options:

You can customize SEE Finance in many, many ways. You can change

colors, transaction layouts, images, fonts, have fun changing transition effects, and much more.









### Capabilities

- Track all you accounts
  - Checking
  - Savings
  - Credit cards
- Create budgets
- Monitor your finances
- Connect directly to your bank accounts (bank fees?)
  - Track your information in real time
- Filters allow automatically categorizing on import of data
- Uses Quicken "greater than 2004" data for imports (.qfx)

## **Additional Features**

- Investment tracking
- Investment monitoring
- Loans
- Schedule recurring events
- Asset tracking
- Liability
- Multiple currency support
- Reports are customizable
- CON: No mobile SEE Finance app

### Most Used Page

000			SEE Finan	ice				
OVERVIEW Balances \$ 58,672,47	Bank Acco	unt: My Bank	Edit	Overview	Transactions	Statements	Online	3
	Statement	Start D	ate	End Date	Starting Balance	Ending B	alance	
Reports	January 201-	4 4/4	8	1/注/共	\$ 10,00	00.00	\$10,207	モル
Budgets								
Payees, Types & Categories								
Transaction Filters								
Recurring Transactions								
▼ INCOME								
My Job			and the second s					
▼ CASH	+ -	Reconcile Starts	1/ 1/2014	End: 12/31/2099 🗘	Reconciled Ba	dance: S	10,202.30	1
5 My Pocket \$ 500.00	Date	Payee	Туре	Category	Payment	Deposit 1	Balance	~
* BANKING	1/1/14	My Job	Deposit	Salary		\$ 2,000.00	\$ 12.000.00	1
A MARKE SUSSEE	1/2/14	My Investments	Transfer	[My Investments]	\$ 200.00		\$ 11,800.00	1
INVESTMENTS	1/3/14	My Credit Card	Transfer	[My Credit Card]	\$ 300.00		\$ 11,500.00	
	1/4/14	Mobil	POS	Auto - Fuel	\$ 45.00		\$ 11,455.00	14
Yortfolio \$ 54,970.17	1/5/14	Best Buy	POS	Entertainment	\$ 95.29		\$ 11,359.71	1. The second
My Investme 5 54,970.17	1/6/14	Applebees	POS	Dining	\$ 50.00		\$ 11,309.71	
¥ ASSETS	1/7/14	ATM Withdrawal	ATM	Misc	\$ 60.00		\$ 11,249.71	
🕵 My Car 5 5,000.00	1/8/14	Walmart	POS	Home	\$ 100.00		\$ 11,149.71	
NAME AND ADDRESS OF AD	1/9/14	McDonalds	POS	Dining	\$ 15.36		\$ 11,134.35	
▼ LOANS	1/10/14	Cinema 10	POS	Entertainment	\$ 36,50		\$ 11,097.85	1000
My Loan -\$ 10,000.00	1/11/14	Mobil	POS	Auto - Fuel	\$ 45.00		\$ 11,052.85	0.000
♥ CREDIT CARDS	1/12/14	Netflix	Direct Debit	Entertainment	\$ 19.99		\$ 11,032.86	
🔙 My Credit Card -\$ 1,000.00	1/13/14	Steak n Shake	POS	Dining	\$ 35.48		\$ 10,997.38	
▼ LIABILITIES	1/14/14	Albertsons	POS	Groceries	\$ 215.36		\$ 10,782.02	_
	1/15/14	My Job	Deposit	Salary		The second s	\$ 12,782.02	ALC: TOTAL
🦥 My Liability -\$ 1,000.00	1/16/14	Power Company	Direct Debit	Utilities	\$ 250.00		\$ 12,532.02	
	1/17/14	Cable Company	Direct Debit	Utilities	\$ 150.00		\$ 12,382.02	
	1/18/14	Mobil	POS	Auto - Fuel	\$ 45.00		\$ 12,337.02	
	1/19/14	Home Depot	POS	Repairs	\$ 113.09		\$ 12,223.93	
	1/20/14	Burger King	POS	Dining	\$ 16.25		\$ 12,207.68	1
+ & +						Q.		2

Example Screen shots here: https://scimonocesoftware.com/seefinance/screenshots.html 5

### **Transaction List**

OVERVIEW	Bank Acco	unt: My Bank	Edit 🗐	Overview	Transactions	Statements	Online	15
Balances \$ 58,672.47	Date	Payee	Туре	Category	Payment	Deposit	Balance	1.
1 March 1 March 2 Marc	1/3/14	My credit caro	Transfer	(My Credit Card)	3 300.00	50 SW	\$ 11,500.00	
Budgets	1/4/14	Mobil	POS	Auto - Fuel	\$ 45.00		\$ 11,455.00	
Payees, Types & Categories	1/5/14	Best Buy	POS	Entertainment	\$ 95.29		\$ 11,359.71	
Transaction Filters	1/6/14	Applebees	POS	Dining	\$ 50.00		\$ 11,309.71	
Recurring Transactions	1/7/14	ATM Withdrawal	ATM	Misc	\$ 60.00		\$ 11,249.71	
11 March 1997	1/8/14	Walmart	POS	Home	\$ 100.00		\$ 11,149.71	
INCOME	1/9/14	McDonalds	POS	Dining	\$ 15.36		\$ 11,134.35	
📷 My Job	1/10/14	Cinema 10	POS	Entertainment	\$ 36.50		\$ 11,097.85	
CASH	1/11/14	Mobil	POS	Auto - Fuel	\$ 45.00		\$ 11,052.85	
Ky Pocket \$ 500.00	1/12/14	Netflix	Direct Debit	Entertainment	\$ 19.99		\$ 11,032.86	
and a second	1/13/14	Steak n Shake	POS	Dining	\$ 35.48		\$ 10,997.38	
BANKING	1/14/14	Albertsons	POS	Groceries	\$ 215.36		\$ 10,782.02	
Uni 40 Back 5 10 202 20	1/15/14	My Job	Deposit	Salary		\$ 2,000.00	\$ 12,782.02	8
INVESTMENTS	1/16/14	Power Company	Direct Debit	Utilities	\$ 250.00		\$ 12,532.02	
54,970.17	1/17/14	Cable Company	Direct Debit	Utilities	\$ 150.00		\$ 12,382.02	
	1/18/14	Mobil	POS	Auto - Fuel	\$ 45.00		\$ 12,337.02	
My Investme \$ 54,970.17	1/19/14	Home Depot	POS	Repairs	\$ 113.09		\$ 12,223.93	16
ASSETS	1/20/14	Burger King	POS	Dining	\$ 16.25		\$ 12,207.68	
A My Car \$ 5,000.00	1/21/14	Kroger	POS	Groceries	\$ 193.79		\$ 12,013.89	G
LOANS	1/22/14	Auto Zone	POS	Auto - Service	\$ 53.49		\$ 11,960.40	
	1/23/14	Phone Company	Direct Debit	Utilities	\$ 90.00		\$ 11,870.40	3
🕎 My Loan -\$ 10,000.00	1/24/14	Cinema 10	POS	Entertainment	\$ 36.50		\$ 11,833.90	2
CREDIT CARDS	1/25/14	Mobil	POS	Auto - Fuel	\$ 45.00		\$ 11,788.90	6
My Credit Card -5 1,000.00	1/26/14	Toys r Us	POS	Recreation	\$ 56.47		\$ 11,732.43	1
LIABILITIES	1/27/14	Subway	POS	Dining	\$ 13.76		\$ 11,718.67	
And the first of the second seco	1/28/14	Schnucks	POS	Groceries	5 253.91		\$ 11,464.76	
Wy Liability -\$ 1,000.00	1/29/14	Krispy Kreme	201	Dining	£ 13.46		\$ 11.452 50	E,
	1/30/14	ATM Withdrawal	ATM	Misc	\$ 50.00		\$ 11,402.30	é
	Start: 1/	1/2014 End: 1	2/31/2099	The second second second	84	Jance:	\$ 10,202.30	

### **Edit Transactions**

OVERVIEW	Bank Accou	nt: My Bank	Edit 📃 🗮	Overview	w Transactions	Statements	Online	
Balances \$ 58,672.47	Date	Payee	Туре	Category	Payment	Deposit	Balance	
- neperce	1/15/14	My job	Deposit	Salary		\$ 2,000.00	\$ 12,782.02	
Budgets	1/16/14	Power Company	Direct Debit	Utilities	\$ 250.00		\$ 12,532.02	
Payees, Types & Categories	1/17/14	Cable Company	Direct Debit	Utilities	\$ 150.00		\$ 12,382.02	į,
Transaction Filters	1/18/14	Mobil	POS	Auto - Fuel	\$ 45.00		\$ 12,337.02	
Recurring Transactions	1/19/14	Home Depot	POS	Repairs	\$ 113.09		\$ 12,223.93	
	1/20/14	Burger King	POS	Dining	\$ 16.25		\$ 12,207.68	1
HTLOHL	1/21/14	Kroger	POS	Groceries	\$ 193.79		\$ 12,013.89	
💒 My Job	1/22/14	Auto Zone	POS	Auto - Service	\$ 53.49		\$ 11,960.40	i.
CASH	1/23/14	Phone Company	Direct Debit	Utilities	\$ 90.00		\$ 11,870.40	
My Pocket \$ 500.00	1/24/14	Cinema 10	POS	Entertainment	\$ 36.50		\$ 11,833.90	
BANKING	1/25/14	Mobil	POS	Auto - Fuel	\$ 45.00		\$ 11,788.90	
BIOTHERS.	1/26/14	Toys r Us	POS	Recreation	\$ 56.47		\$ 11,732.43	
Will My Back 5 10:502:33	1/27/14	Subway	POS	Dining	\$ 13.76		\$ 11,718.67	i i
(INVESTMENTS	1/28/14	Schnucks	POS	Grocerles	\$ 253.91		\$ 11,464.76	1
S 54,970.17	1/29/14	Krispy Kreme	PCS	Dinme	\$ 12-46		\$ 11,452 30	
My Investme \$ \$4,970.17	(reliant)		0		23	10 T		-
ASSETS	Start: 1/	1/2014 🕄 End: 12,	/31/2099 🕃		Ba	lance:	\$ 10,202.30	Į.
	_		182					
S My Car \$ 5,000.00	Selected	Transaction Info:				in	tage:	ł
LOANS								
🔛 My Loan -\$ 10,000.00	Date	1/29/2014	Pi Pi	ayele: Krispy Kreme	1			
CREDIT CARDS		Press Contractor	1 11 4655	A		Tran	saction	
2 My Credit Card -5 1,000.00	Тура	POS	<ul> <li>Care</li> </ul>	eory: Dining		li li	nage	
	A Service	Memo	Nue	ber. Transaction I	Jumber			
UABILITIES	. Contraction	Mento		The transaction i	Number	Drag	File Here	
My Liability -\$ 1,000.00	Check	Check Number	Ama	ountt	-\$ 12.46			
		and the second s	1 2000	sources.	10 million (10 mil	1		
	Lock	+ - 4				Open	in View	

### Investments

000				SEE Finan	ce.scst					
OVERVIEW Balances	1 53,488,86	Investment: P	ortfolio	Info	2	Analy	Stocks	Bonds	Options	1
Baporta		Portfolio Anal	ysis:			0	erview 💽	conty List	Watch List	
Budgets		Security Symbol	Туре	Name		Value	Previous Value	Change	% Change	- 4
Payees, Types &	Categories	= 570CK5	Stocks	Held Stock	6					
Transaction Filte	ni -	AAPL	Stock	Apper Inc.		\$ 348.42	5 3 6 1 1 K	5.277	0.51	
Recurring Trans	Ictions	AVA	Stock	Avista Corp	oration C	\$ 22.96	\$ 22.95	\$ 0.01	0.04	13
INCOME	00078750	8A.	Stock	Boeing Con	npany (Th	\$ 70.15	\$ 68.95	\$ 1.19	1.73	136
English and		BLK	Stock	BlackRock,	Inc. Com	\$ 193.84	\$ 193.42	5 0.42	0.22	
My Job		COKE	Stock	Coca-Cola		\$ 56.07	\$ 55.83	5 0.24	0.43	
CASH		EGY	Stock		rgy Inc Co		\$ 7.24	\$ 0.23	3.18	
My Pocket	\$ 500.00	GE	Stock	General Ele	ctric Com		\$ 18.63		0.21	
BANKING	10000	M	Stock		Common		\$ 23.24	-5 0.02	00.00	
and the second second	Springer and	PFE	Stock	Pfizer, Inc.	Common	\$ 18.37	5 18.22	\$ 0.15	0.82	р¥,
My Bank	\$ 10,202.30	* BONOS	Bonds	Held Bonds	in the second second			5-2007/10		
INVESTMENTS.			Bond	Bond Co		\$ 100.00	\$ 100.00	-\$ 0.00	-0.00	15
S Portain	141 - SE									_
My Investments	\$ 49,786.56				Ap	ple Inc.				
ASSETS	10000	131622 153	1/1/02 1/1/03	1/1/04	3/3/05	1/1/06 1/1/07	3/3/04 3/	1/09. 1/1/10	1/1/11	20
Se My Car	\$ 5,000.00	\$ 150,00		1.1.1.1.1.1.1			1.1.1.1.1.1.1.1	Contraction of the	\$ 310.	0.5
LOANS		1.100.00							5/10 \$ 300/	
Wy Loan	-\$ 10,000.00	1 250,00							14.38 9 256	00
CREDIT CARDS		\$ 205.60					144176025	2.00	\$ 200.	00
My Credit Card	-51,000.00	1 150.00							-5 110.	00
110000000000000000000000000000000000000		\$ 104.00					10 A. 10	100	5 105	00
LIABILITIES	-	1 50.00			and the second	State and			5 50.0	6
My Liability	-\$ 1,000.00	10.00			Contraction of the local division of the loc	and the second	and the second second	and the second second	-5 0.00	1.1
		1.0.0000	1/1/02 1/1/03	1/1/04	1/1201	1/1/06 1/1/07	1/1/08 1	1/05 1/1/10	1/1/11	

### Control & color-code of Categories

		SEE F	inance.scsf					
FRVIEW Balances \$ 56,560.40	Payees, Types & Catego	ries				Payces	Types	Categories
Reports Budgets F Payees, Types & Categories	Category Name Col Advertising		Tax Related	Tax Code	Image	Select	ed Category	Name
Transaction Filters Recurring Transactions INCOME My Job BANKING My Bank \$ 10,202.30 INVESTMENTS Portfolio \$ 53,358.10 My Investments \$ 11,990.00 ASSETS	Bad Debt Bank Charge Bank Charge (B Benefits Bonus CPP Canada Expense Canada Income Canada Taxes Car & Truck Cash					Name Cloth Color Expen Tax Re Tax C	ing se: 🗹 inted: 🔳	List
S, My Car \$ 5,000.00 LOANS My Loan -\$ 10,000.00 CREDIT CARDS	Charity Child Care Clothing Commission5 Cost of Goods Depletion Depreciation	<b>ERGERIZE</b>	<u> </u>			Image		
My Credit Card -5 1,000.00 LIABILITIES My Liability -5 1,000.00	Depreciation Dining Dividend Income Dues Education Entertainment Freight GST (Goods An							

# Budget

000			SEE Finance.scsf	
OVERVIEW	\$ 56,560.40	Budgets	Print	
Reports	Conversion of	Budget Name		
Payees, Ty Transactic Recurring	ypes & Categories on Filters Transactions	My Gudget	Period: Range of Dates	0
INCOME			Budgeted: \$ 4,000.00	
My Job			Actual 5 4,000.00	
BANKING			Manager and Annual an	
My Bank			Expenses: Budgeted: \$ 3,800.00	
Portfolio	\$ 53,358.10 ments \$ 11,990.00	+ - Duplicate	Actual: \$ 3,297.70	
ASSETS	and the second secon			
S My Car	\$ 5,000.00	Selected Budget	Income Explicites Categories	Monitor
LOANS		Expense	Budget Performance Budgeted Actual Amount	nt Difference
My Loan	-\$ 10,000.00	Auto	\$ 300.00 \$ 2333	9 - V 66 N
CREDIT CARD	5	Dining	\$ 200.00 \$ 143.3	-\$ 56.69
My Credit	Card ~5 1,000.00	Entertainment	\$ 200.00 \$ 188.2	-\$ 11.72
LIABILITIES		Grocerles	\$ 700.00 \$ 663.0	-\$ 36.9
Wy Liabilit	v -\$ 1,000.00	Home	\$ 200.00 \$ 100.0	0 -\$ 100.00
wy Liabill	ty -5 1,000.00	Misc	\$ 200.00 \$ 110.0	-\$ 90.00
		Mortgage	\$ 1,200.00 \$ 1,200.0	0 \$ 0.01
		Recreation	\$ 100.00 \$ 56.4	-\$ 43.5
		Repairs	\$ 200.00 \$ 113.0	9 -\$ 86.9
		Utilities	\$ 500.00 \$ 490.0	
		Untracked Expenses	\$ 0.00 \$ 0.0	2 S
+			E -	therse

### Reports

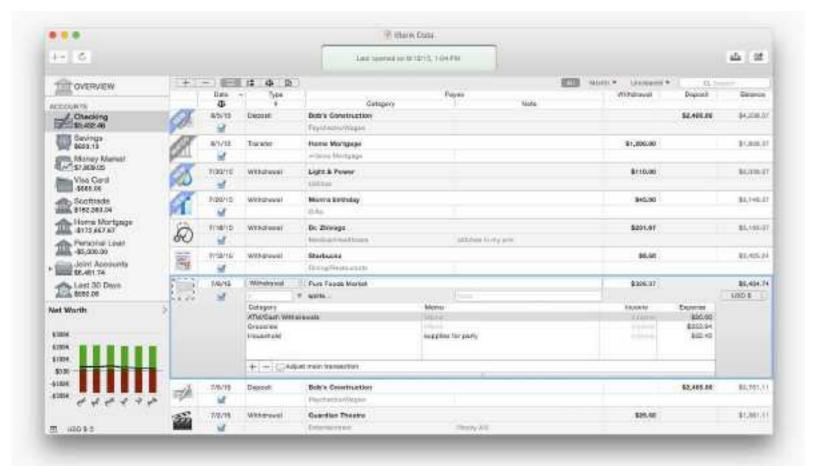
	SEE Finance			
Reports 💽 💌	Balances Cash	Flow Investments	Payee Type	Category Memo
Report Name Critegouy, Report + Duplicate Exp	List Style: Accounts My Karik – C	Categories with Inter-	Categories Adventiono Auto Auto - Fuel	1/2014 (\$ ()) Sfors
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### URLs

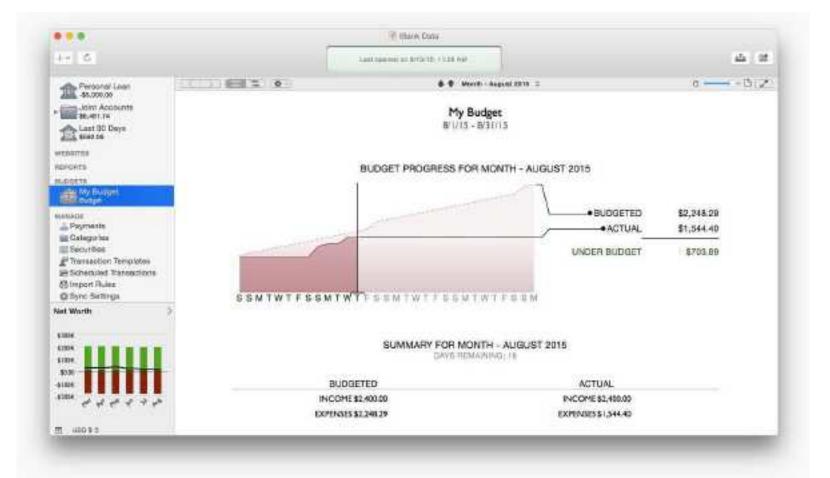
- SEE Finance Home: <u>https://scimonocesoftware.com/seefinance/</u>
- SEE Finance Screen shots: <u>https://scimonocesoftware.com/</u> <u>seefinance/screenshots.html</u>
- Reviews & Comparisons:
  - <u>https://itunes.apple.com/us/app/see-finance/id1017159112?</u>
     <u>mt=12</u>
  - <u>http://personal-finance-software-review.toptenreviews.com/</u> <u>mac-personal-finance-software/see-finance-review.html</u>
  - <u>http://download.cnet.com/SEE-Finance/3000-2057\_4-10967412.html</u>
- More Banking Applications have come online since Quicken dumped Macs for three years running:
  - <u>http://personal-finance-software-</u>
     <u>review.toptenreviews.com/mac-personal-finance-software/</u>
- Cost: \$39.99

### Banktivity (formally iBank)

Mike Marus



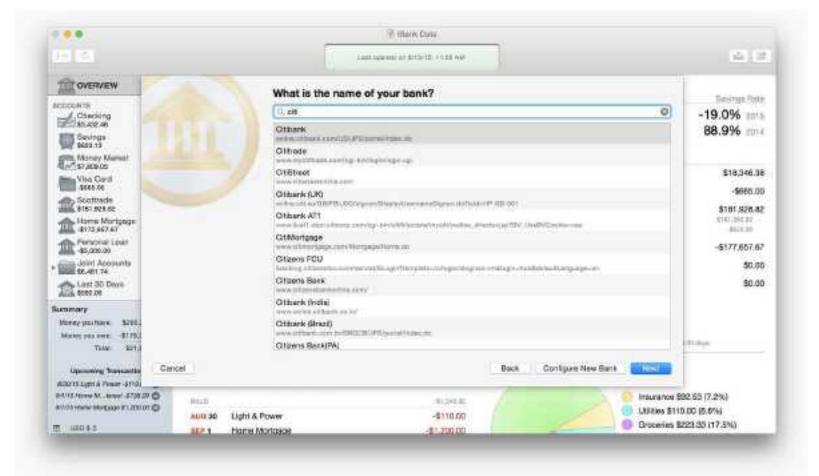
#### Account Register



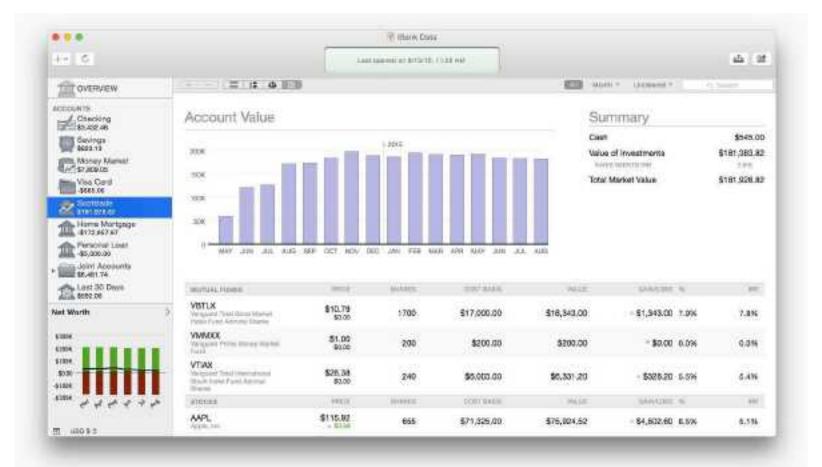
#### **Budget Performance**



#### Account Summary



#### Adding an Account



#### **Investment Summary**



#### Loan Analysis

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#### Plays Nice with Your Other Devices

### Miscellaneous Information

- Check it out at <a href="https://www.iggsoftware.com">https://www.iggsoftware.com</a>
- 30 day free trial
- \$59.99
- Also available from the App Store (no free trial)
- Imports easily from Quicken
- Pay bills directly from Banktivity