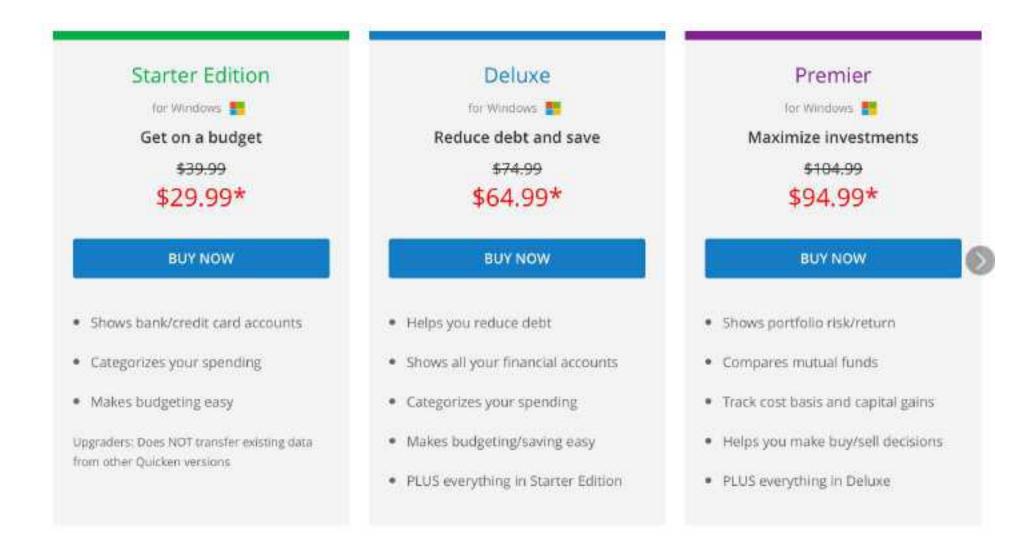
Quicken and Mint

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 ¹	*			
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.

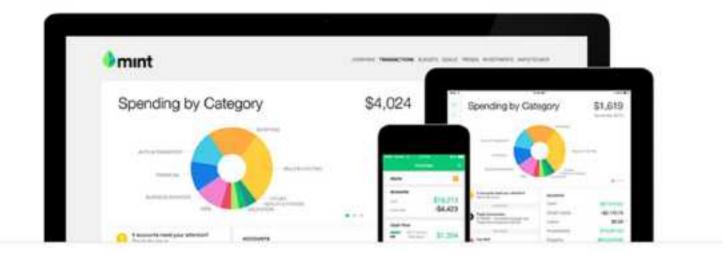
Mint makes managing your personal finances a cinch. Be the master of your money so you can get more out of life.

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.



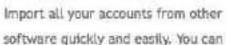
Custom Reports:

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

your needs.



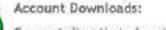
Import Accounts:



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

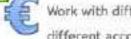
more detailed information.



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	
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Payees, Types & Categories								
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🔙 My Credit Card -\$ 1,000.00	1/13/14	Steak n Shake	POS	Dining	\$ 35.48		\$ 10,997.38	
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🦥 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
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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.
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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	
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CASH	1/11/14	Mobil	POS	Auto - Fuel	\$ 45.00		\$ 11,052.85	
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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	
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INVESTMENTS	1/16/14	Power Company	Direct Debit	Utilities	\$ 250.00		\$ 12,532.02	
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	1/18/14	Mobil	POS	Auto - Fuel	\$ 45.00		\$ 12,337.02	
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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
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My Credit Card -5 1,000.00	1/26/14	Toys r Us	POS	Recreation	\$ 56.47		\$ 11,732.43	1
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	1/30/14	ATM Withdrawal	ATM	Misc	\$ 50.00		\$ 11,402.30	é
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Edit Transactions

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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
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My Pocket \$ 500.00	1/24/14	Cinema 10	POS	Entertainment	\$ 36.50		\$ 11,833.90	
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Investments

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English and		BLK	Stock	BlackRock,	Inc. Com	\$ 193.84	\$ 193.42	5 0.42	0.22	
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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
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S, My Car \$ 5,000.00 LOANS My Loan -\$ 10,000.00 CREDIT CARDS	Charity Child Care Clothing Commission5 Cost of Goods Depletion Depreciation	ERGERIZE	<u> </u>			Image		
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Budget

000			SEE Finance.scsf	
OVERVIEW	\$ 56,560.40	Budgets	Print	
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wy Liabill	ty -5 1,000.00	Misc	\$ 200.00 \$ 110.0	-\$ 90.00
		Mortgage	\$ 1,200.00 \$ 1,200.0	0 \$ 0.01
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Reports

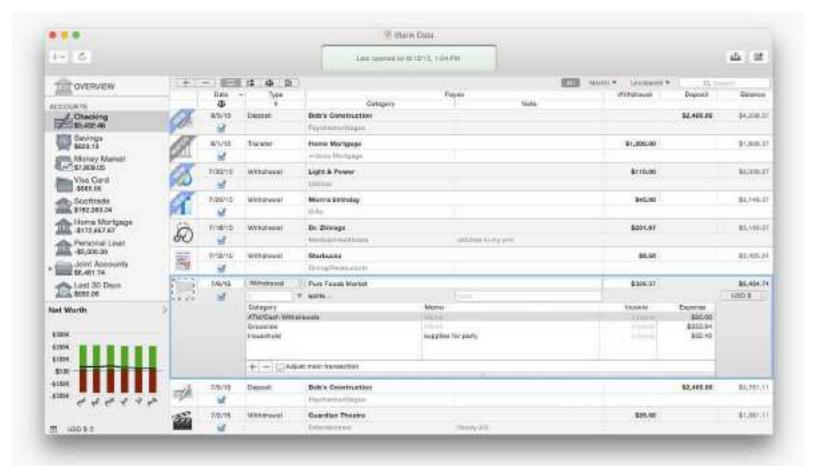
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URLs

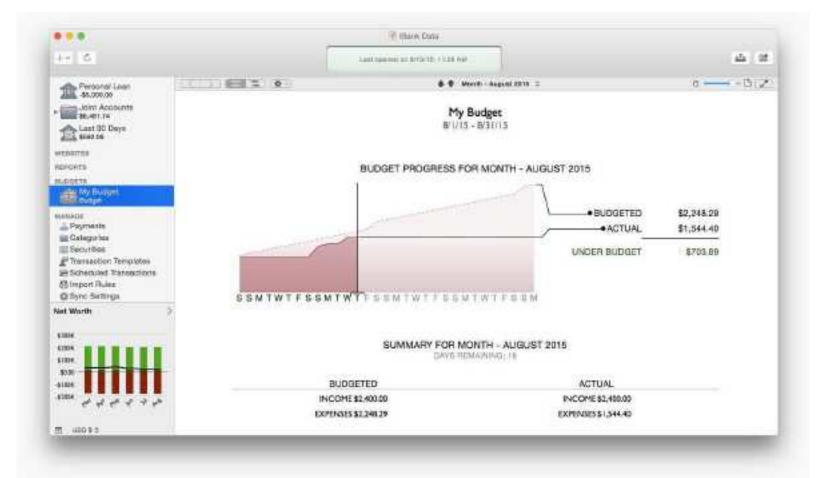
- SEE Finance Home: <u>https://scimonocesoftware.com/seefinance/</u>
- SEE Finance Screen shots: <u>https://scimonocesoftware.com/</u> <u>seefinance/screenshots.html</u>
- Reviews & Comparisons:
 - <u>https://itunes.apple.com/us/app/see-finance/id1017159112?</u>
 <u>mt=12</u>
 - <u>http://personal-finance-software-review.toptenreviews.com/</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



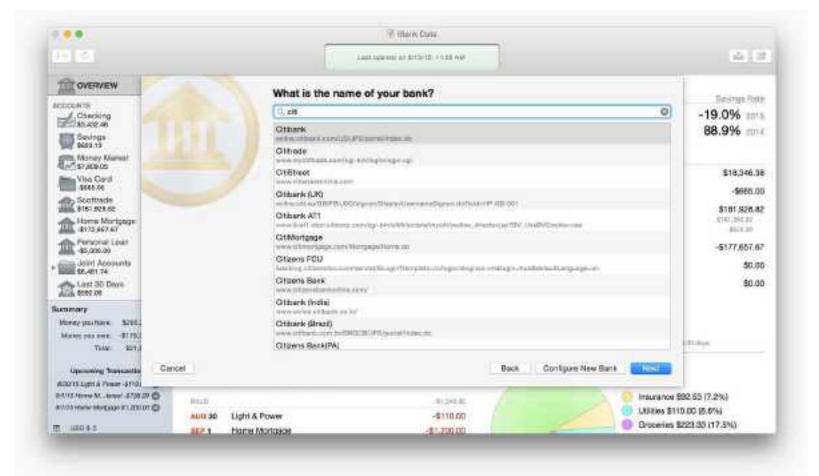
Account Register



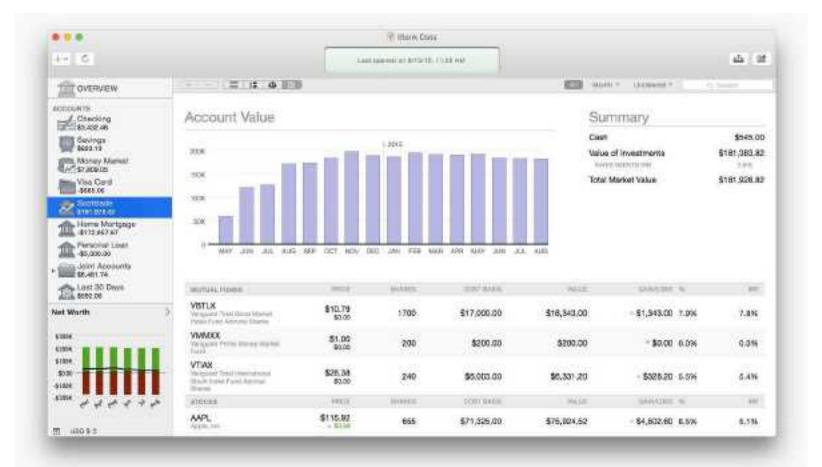
Budget Performance



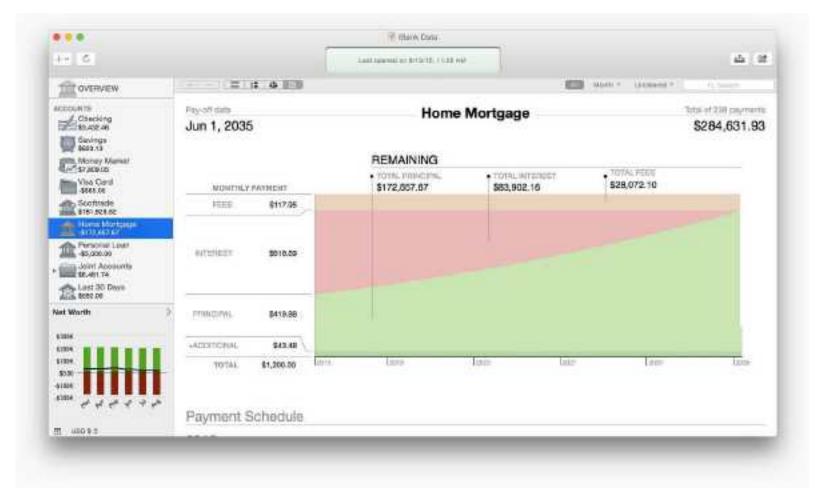
Account Summary



Adding an Account



Investment Summary



Loan Analysis

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Plays Nice with Your Other Devices

Miscellaneous Information

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