

# Quicken and Mint

Jim Johnson

# Quicken for Windows

## Starter Edition

for Windows 

Get on a budget

~~\$39.99~~

**\$29.99\***

[BUY NOW](#)

- Shows bank/credit card accounts
- Categorizes your spending
- Makes budgeting easy

Upgraders: Does NOT transfer existing data from other Quicken versions

## Deluxe

for Windows 

Reduce debt and save

~~\$74.99~~

**\$64.99\***

[BUY NOW](#)

- Helps you reduce debt
- Shows all your financial accounts
- Categorizes your spending
- Makes budgeting/saving easy
- PLUS everything in Starter Edition

## Premier

for Windows 

Maximize investments

~~\$104.99~~

**\$94.99\***

[BUY NOW](#)

- Shows portfolio risk/return
- Compares mutual funds
- Track cost basis and capital gains
- Helps you make buy/sell decisions
- PLUS everything in Deluxe



# Quicken 2016 for Mac

	Quicken 2016 for Mac <a href="#">BUY NOW</a> \$74.99	Quicken 2015 for Mac	Quicken 2007 for Mac	Quicken Premier (Windows) <a href="#">BUY NOW</a> \$104.99
Features				
<b>New</b> Single-click conversion from Quicken Windows to Quicken for Mac 2016 <sup>1</sup>	✓			
<b>New</b> Pay bills from Quicken*	✓		✓	✓
<b>New</b> 12-month budget	✓		✓	✓
<b>New</b> Portfolio time machine	✓		✓	✓
<b>New</b> Transfer money between different accounts within your bank	✓		✓	✓
<b>New</b> Free phone support*	✓		✓	✓
<b>New</b> 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

Editor Rating  
★★★★☆

**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.

[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 utilize 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.**

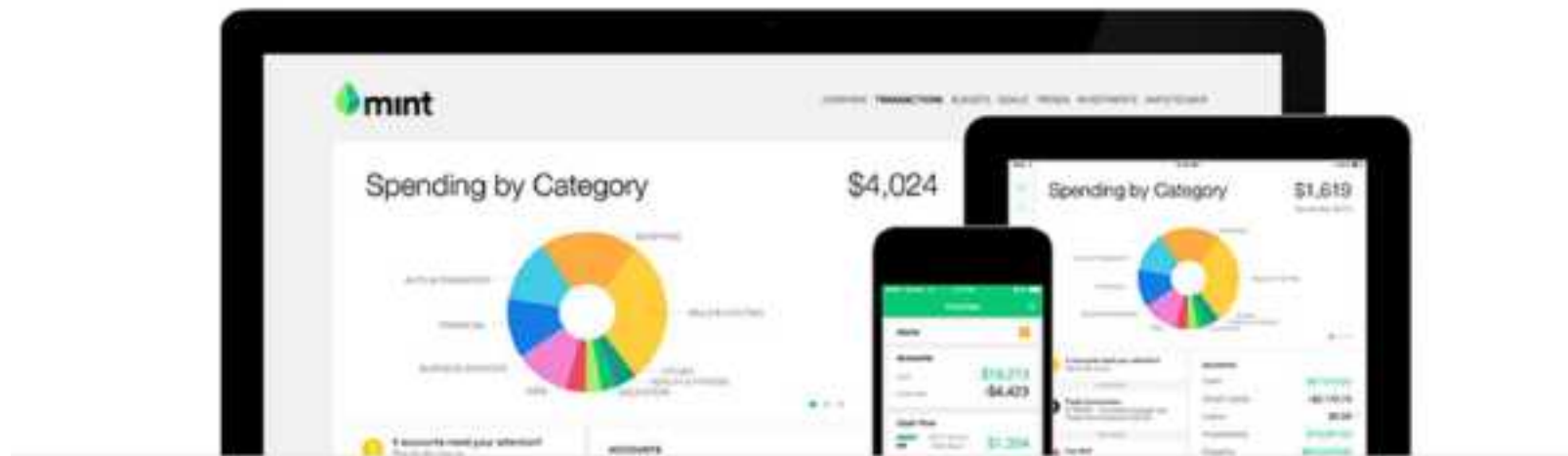
Mint makes managing your personal finances a cinch. Be the master of your money so you can get more out of life.

 **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



Review of: Mint.com

Reviewed by: Larry Ludwig

Last modified: April 28, 2016

Editor Rating



**Summary:** Manage all of your accounts from one service with the ability to budget. Though Mint's investing tools are simplistic, and many users report issues with synchronization.

[MORE DETAILS](#)

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 utilize 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 software quickly and easily. You can easily import data found in QIF, QMTE, CSV, QFX and OFX files.



### Account Downloads:

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

**Bank Account: My Bank**    Edit    Overview    Transactions    **Statements**    Online

Statement	Start Date	End Date	Starting Balance	Ending Balance
January 2014	1/1/14	1/31/14	\$ 10,000.00	\$ 10,202.30

Reconcile    Start: 1/ 1/2014    End: 12/31/2099    Reconciled Balance: \$ 10,202.30

Date	Payee	Type	Category	Payment	Deposit	Balance	✓
1/1/14	My Job	Deposit	Salary		\$ 2,000.00	\$ 12,000.00	✓
1/2/14	My Investments	Transfer	[My Investments]	\$ 200.00		\$ 11,800.00	✓
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	✓
1/5/14	Best Buy	POS	Entertainment	\$ 95.29		\$ 11,359.71	✓
1/6/14	Applebees	POS	Dining	\$ 50.00		\$ 11,309.71	✓
1/7/14	ATM Withdrawal	ATM	Misc	\$ 60.00		\$ 11,249.71	✓
1/8/14	Walmart	POS	Home	\$ 100.00		\$ 11,149.71	✓
1/9/14	McDonalds	POS	Dining	\$ 15.36		\$ 11,134.35	✓
1/10/14	Cinema 10	POS	Entertainment	\$ 36.50		\$ 11,097.85	✓
1/11/14	Mobil	POS	Auto - Fuel	\$ 45.00		\$ 11,052.85	✓
1/12/14	Netflix	Direct Debit	Entertainment	\$ 19.99		\$ 11,032.86	✓
1/13/14	Steak n Shake	POS	Dining	\$ 35.48		\$ 10,997.38	✓
1/14/14	Albertsons	POS	Groceries	\$ 215.36		\$ 10,782.02	✓
1/15/14	My Job	Deposit	Salary		\$ 2,000.00	\$ 12,782.02	✓
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	✓

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

# Transaction List

SEE Finance

Bank Account: My Bank

Overview Transactions Statements Online

Date	Payee	Type	Category	Payment	Deposit	Balance	✓
1/3/14	My Credit Card	Transfer	(My Credit Card)	\$ 300.00		\$ 11,300.00	✓
1/4/14	Mobil	POS	Auto - Fuel	\$ 45.00		\$ 11,455.00	✓
1/5/14	Best Buy	POS	Entertainment	\$ 95.29		\$ 11,359.71	✓
1/6/14	Applebees	POS	Dining	\$ 50.00		\$ 11,309.71	✓
1/7/14	ATM Withdrawal	ATM	Misc	\$ 60.00		\$ 11,249.71	✓
1/8/14	Walmart	POS	Home	\$ 100.00		\$ 11,149.71	✓
1/9/14	McDonalds	POS	Dining	\$ 15.36		\$ 11,134.35	✓
1/10/14	Cinema 10	POS	Entertainment	\$ 36.50		\$ 11,097.85	✓
1/11/14	Mobil	POS	Auto - Fuel	\$ 45.00		\$ 11,052.85	✓
1/12/14	Netflix	Direct Debit	Entertainment	\$ 19.99		\$ 11,032.86	✓
1/13/14	Steak n Shake	POS	Dining	\$ 35.48		\$ 10,997.38	✓
1/14/14	Albertsons	POS	Groceries	\$ 215.36		\$ 10,782.02	✓
1/15/14	My Job	Deposit	Salary		\$ 2,000.00	\$ 12,782.02	✓
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	✓
1/21/14	Kroger	POS	Groceries	\$ 193.79		\$ 12,013.89	✓
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	✓
1/24/14	Cinema 10	POS	Entertainment	\$ 36.50		\$ 11,833.90	✓
1/25/14	Mobil	POS	Auto - Fuel	\$ 45.00		\$ 11,788.90	✓
1/26/14	Toys r Us	POS	Recreation	\$ 56.47		\$ 11,732.43	✓
1/27/14	Subway	POS	Dining	\$ 13.76		\$ 11,718.67	✓
1/28/14	Schnucks	POS	Groceries	\$ 253.91		\$ 11,464.76	✓
1/29/14	Kelspy Kreme	POS	Dining	\$ 12.46		\$ 11,452.30	✓
1/30/14	ATM Withdrawal	ATM	Misc	\$ 50.00		\$ 11,402.30	✓

Start: 1/ 1/2014 End: 12/31/2099 Balance: \$ 10,202.30



# Edit Transactions

SEE Finance

Bank Account: My Bank

Edit [Menu] [Print] [Refresh] Overview Transactions Statements Online

Date	Payee	Type	Category	Payment	Deposit	Balance	✓
1/15/14	My Job	Deposit	Salary		\$ 2,000.00	\$ 12,782.02	✓
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	✓
1/21/14	Kroger	POS	Groceries	\$ 193.79		\$ 12,013.89	✓
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	✓
1/24/14	Cinema 10	POS	Entertainment	\$ 36.50		\$ 11,833.90	✓
1/25/14	Mobil	POS	Auto - Fuel	\$ 45.00		\$ 11,788.90	✓
1/26/14	Toys r Us	POS	Recreation	\$ 56.47		\$ 11,732.43	✓
1/27/14	Subway	POS	Dining	\$ 13.76		\$ 11,718.67	✓
1/28/14	Schnucks	POS	Groceries	\$ 253.91		\$ 11,464.76	✓
1/29/14	Krispy Kreme	POS	Dining	\$ 12.46		\$ 11,452.30	✓

Start: 1/ 1/2014 End: 12/31/2099 Balance: \$ 10,202.30

Selected Transaction Info:

Date: 1/29/2014 Payee: Krispy Kreme

Type: POS Category: Dining

Memo: Memo Number: Transaction Number

Check: Check Number Amount: -\$ 12.46

Image: Transaction Image Drag File Here

Lock + - [Print]

Open in View

# Investments



# Control & color-code of Categories

SEE Finance.scsf

Payees, Types & Categories

Payees Types Categories

Category Name	Color	Expense	Tax Related	Tax Code	Image
Advertising	Blue	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Auto	Blue	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Bad Debt	Blue	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Bank Charge	Blue	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Bank Charge (B...	Blue	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Benefits	Blue	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Bonus	Blue	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
CPP	Blue	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Canada Expense	Blue	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Canada Income	Blue	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Canada Taxes	Blue	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Car & Truck	Blue	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Cash	Blue	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Charity	Blue	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Child Care	Blue	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
<b>Clothing</b>	<b>Purple</b>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Commissions	Purple	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Cost of Goods	Purple	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Depletion	Purple	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Depreciation	Purple	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Dining	Purple	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Dividend Income	Purple	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
Dues	Purple	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Education	Purple	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Entertainment	Purple	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Freight	Purple	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
GST (Goods An...	Purple	<input checked="" type="checkbox"/>	<input type="checkbox"/>		

Selected Category Name:  
Name: Clothing  
Color: [Purple]  
Expense:   
Tax Related:   
Tax Code: [List]  
Image:

Import Export

Brothersoft



# Budget





# Reports

SEE Finance

OVERVIEW

- Balances \$ 59,290.67
- Reports
- Budgets
- Payees, Types & Categories
- Transaction Filters
- Recurring Transactions
- INCOME
  - My Job
- CASH
  - My Pocket \$ 500.00
- BANKING
  - My Bank \$ 10,202.30
- INVESTMENTS
  - Portfolio \$ 55,588.37
  - My Investme... \$ 55,588.37
- ASSETS
  - My Car \$ 5,000.00
- LOANS
  - My Loan -\$ 10,000.00
- CREDIT CARDS
  - My Credit Card -\$ 1,000.00
- LIABILITIES
  - My Liability -\$ 1,000.00

Reports

Balances Cash Flow Investments Payee Type **Category** Memo

Report Name: Category Report

Start Date: 1/ 1/2014 End Date: 1/31/2014

Frequency: Semi-Monthly  Include Transfers

List Style: Categories with Intervals

Accounts: My Bank - Checking

Categories: Advertising, Auto, Auto - Fuel

Buttons: +, -, Duplicate, Export, +, -, Add All, +, -, Add All

Category Report

All Income Expenses

Category Report

Income Categories			
Category	1/1/14 - 1/15/14	1/16/14 - 1/31/14	Total
Salary	\$ 4,000.00	\$ 0.00	\$ 4,000.00
Total Income	\$ 4,000.00	\$ 0.00	\$ 4,000.00

Expense Categories			
Category	1/1/14 - 1/15/14	1/16/14 - 1/31/14	Total
Auto	\$ 90.00	\$ 143.69	\$ 233.69
Auto - Fuel	\$ 90.00	\$ 90.00	\$ 180.00
Auto - Service	\$ 0.00	\$ 33.69	\$ 33.69
Driving	\$ 100.00	\$ 42.47	\$ 142.47
Entertainment	\$ 101.70	\$ 36.70	\$ 138.40
Gasoline	\$ 218.36	\$ 447.70	\$ 666.06
Home	\$ 100.00	\$ 0.00	\$ 100.00
Misc	\$ 90.00	\$ 50.00	\$ 140.00
Mortgage	\$ 0.00	\$ 1,200.00	\$ 1,200.00
Repairs	\$ 0.00	\$ 56.47	\$ 56.47
Repairs	\$ 0.00	\$ 713.09	\$ 713.09
Utilities	\$ 0.00	\$ 400.00	\$ 400.00
Total Expenses	\$ 777.06	\$ 2,097.72	\$ 2,874.78

Previous Month: 1/1/14

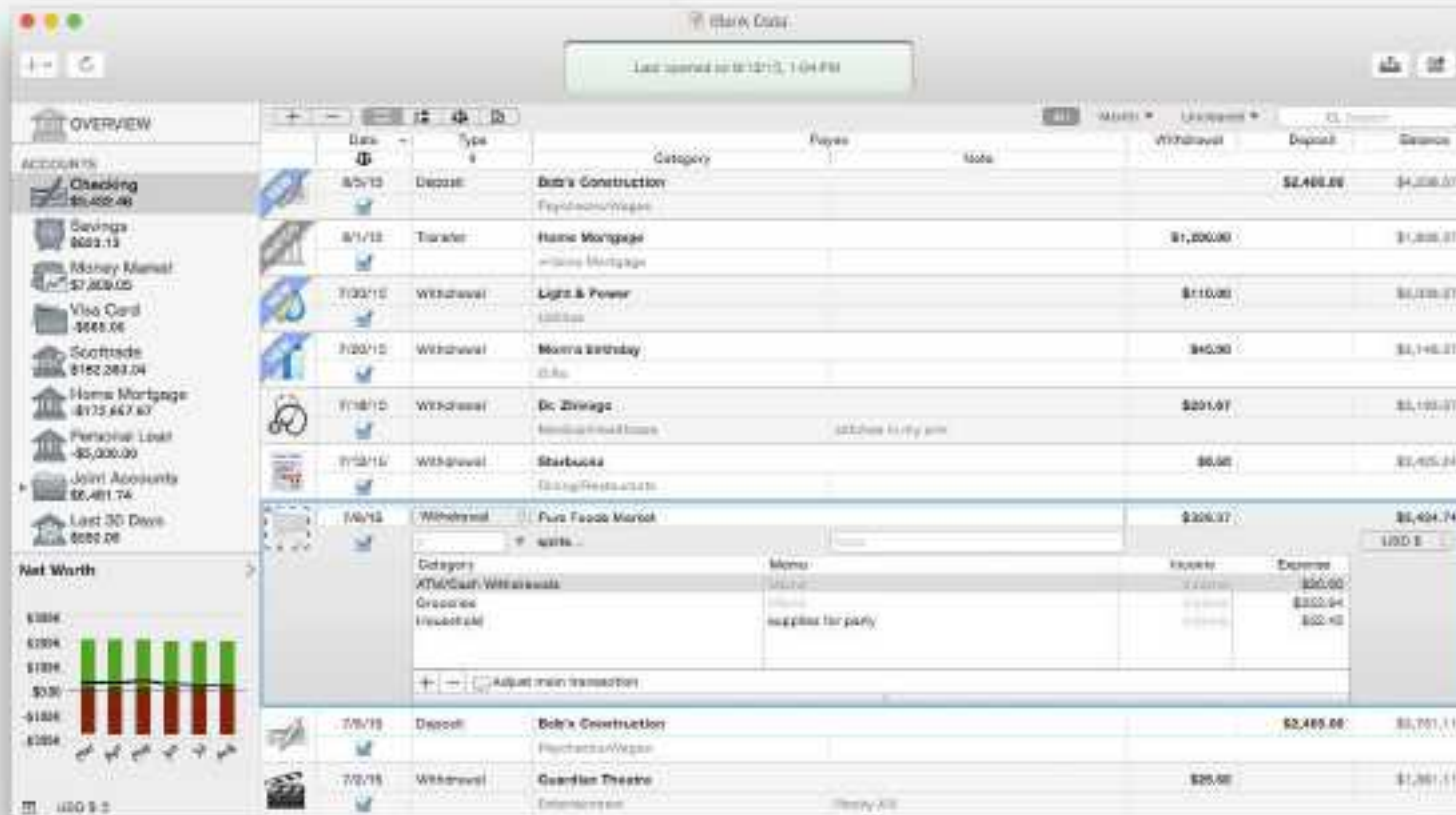
# URLs

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

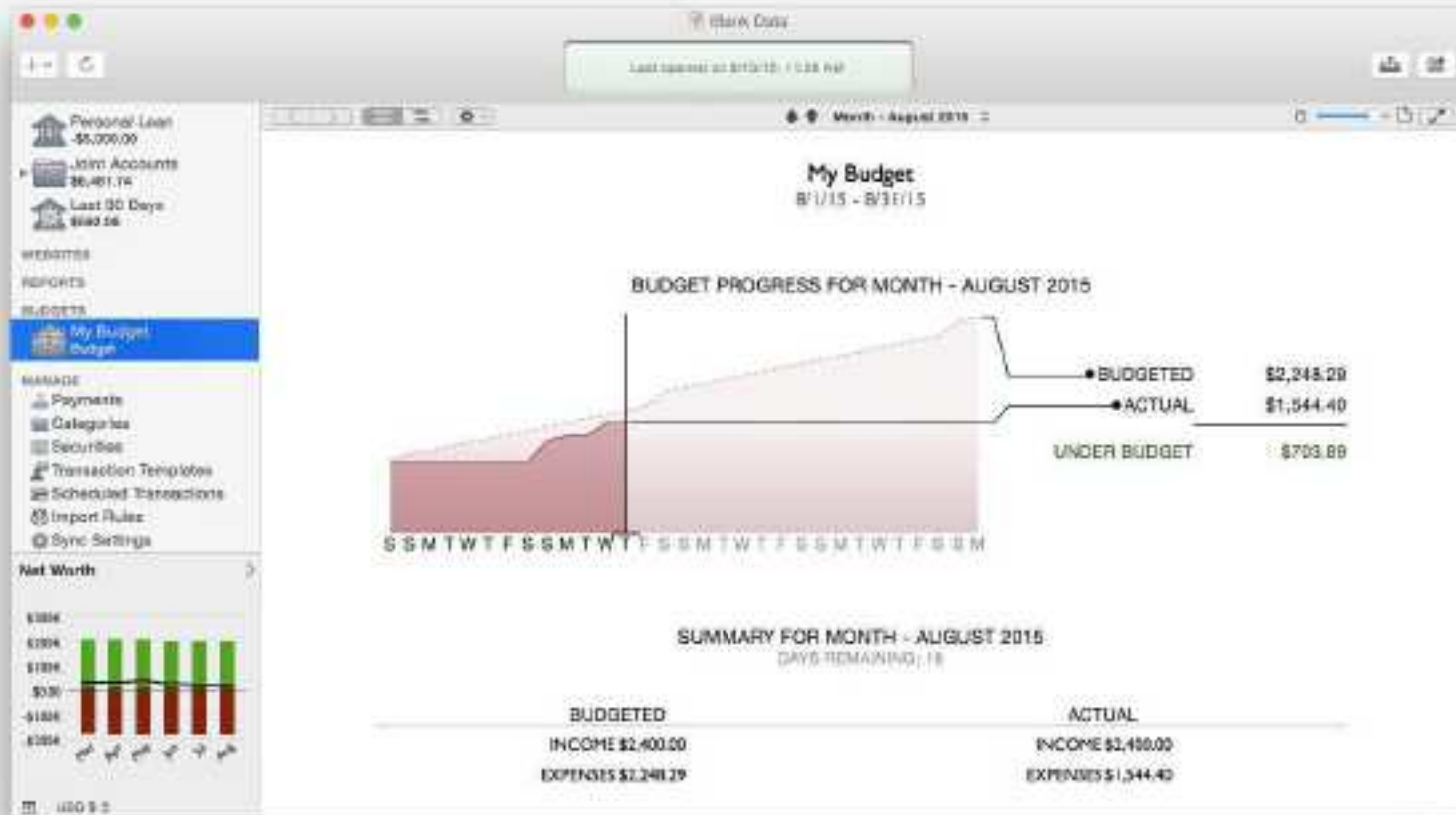
# Banktivity

(formally iBank)

Mike Marus



Account Register



## Budget Performance



## Account Summary



Bank Data

Last updated on 01/01/15 1:08 AM

OVERVIEW

ACCOUNTS

- Checking \$1,422.46
- Savings \$683.13
- Money Market \$7,409.05
- Visa Card \$443.76
- Scottsdale \$181,528.62
- Home Mortgage \$172,447.67
- Personal Loan -\$5,000.00
- Joint Accounts \$5,481.74
- Last 30 Days \$55.00

Summary

Money you have: \$264,934.77  
 Money you owe: -\$175,000.00  
 Total: \$87,934.77

Upcoming Payments

- 02/15 Light & Power -\$170.00
- 04/15 Home M. Inter. -\$700.00
- 07/15 Home Mortgage \$1,250.00

What is the name of your bank?

Search: cit

- Citibank
- Citibank (UK)
- Citibank A/T
- CitiMortgage
- Citizens FCU
- Citizens Bank
- Citibank (India)
- Citibank (Brazil)
- Citizens Bank (PA)

Back Configure New Bank Done

Savings Rate

- 19.0% 2015
- 88.9% 2014

\$18,348.38

-\$655.00

\$181,528.62

\$181,528.62

\$11.00

-\$177,657.67

\$0.00

\$0.00

0 days

02/15 Light & Power -\$170.00

04/15 Home M. Inter. -\$700.00

07/15 Home Mortgage \$1,250.00

02/15

04/15

07/15

Light & Power -\$170.00

Home Mortgage -\$1,250.00

Insurance \$92.55 (7.2%)

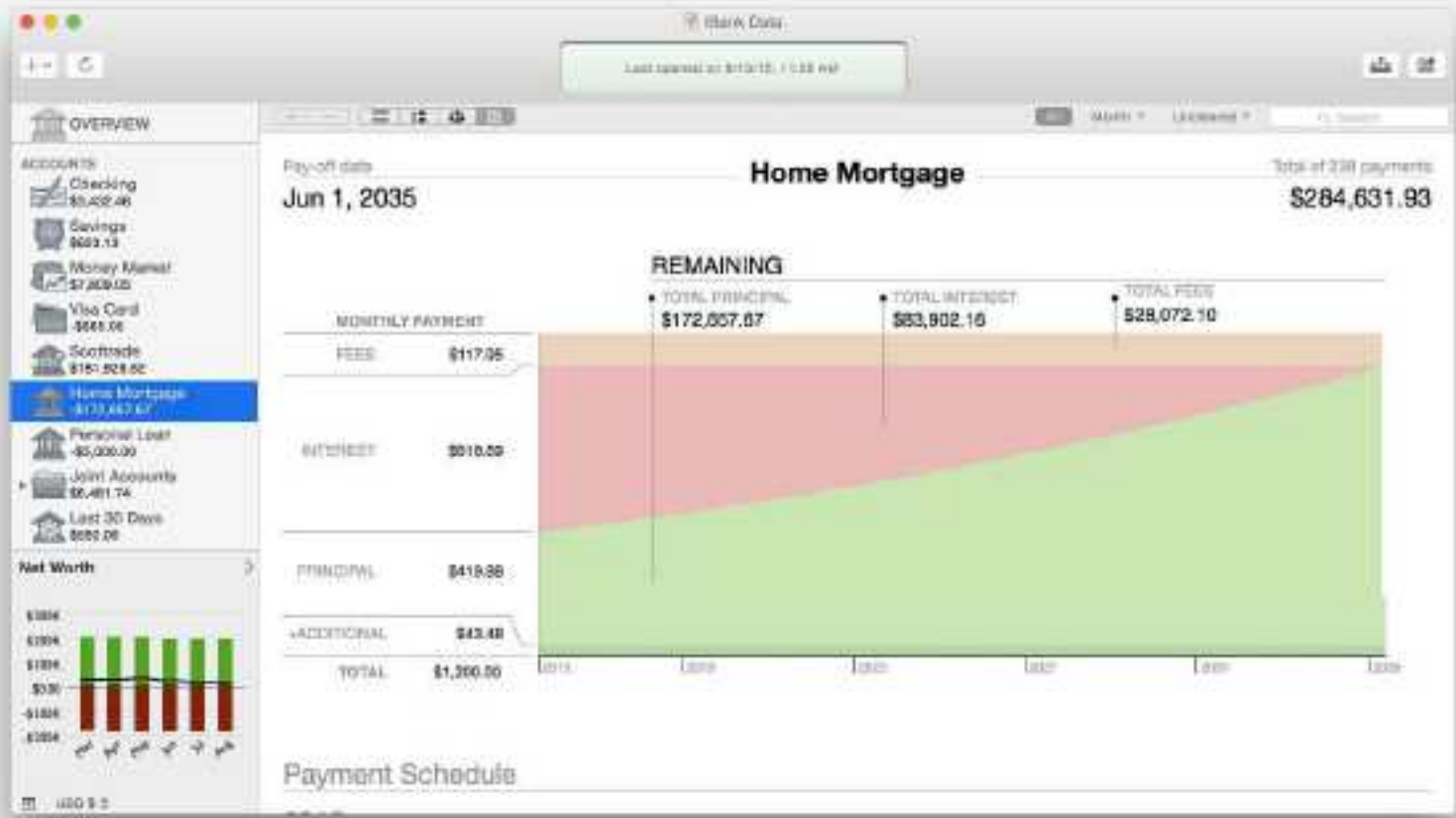
Utilities \$110.00 (8.6%)

Groceries \$221.35 (17.5%)

Adding an Account



## Investment Summary



# Loan Analysis



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