



To our valued Agent clients & friends:

After looking into possible solutions to the Quicken issue most of you are facing, we wanted to let you know our possible options. This is not an ideal situation for many of you given the timing, but nonetheless, a decision needs to be made.

Options:

1. Move to QuickBooks online. It is a relatively easy program based on your business model and something you should have access to from any computer, laptop, IPad. There are several advantages in going online:

- a. We will have access & ability to help as well as pull year end data
- b. Access is web based - you can work on your books from anywhere
- c. If you have a bookkeeper, they will have access to update records
- d. You are able to upload vendors from Quicken making the transition a bit easier

2. Purchase Quicken or QuickBooks and put on a home computer/laptop - you should be able to install and move your current data to the new program -unfortunately, we will not be able to assist with this as we do not have access to your home/personal computers

3. We developed an Excel spreadsheet to assist Agents in compiling data and we are happy to provide

4. Research other programs on your own- plenty of programs are out there, but we are not as familiar with them, however each of you may have a preference that best fits you and your needs

Our preferred method is QuickBooks online, however this likely has the most cost going forward, but the most benefits for you, us and anyone you want with access to your books & records. Moving to QuickBooks online will allow us to help establish a standard chart of accounts as well as assist you in recording your compensation correctly on your books. We have a number of Agents using the product and it has helped with communication.

If you decide to go with any of the QuickBooks products (online or desktop), please contact our office ASAP as we are QuickBooks Pro Advisors and get discounted pricing for clients. You will pay more if you purchase on your own. We will send communication early next week regarding pricing and a detailed list of next steps to get the process moving. You will have work to do on this as well so please prepare for that. We can have Webinars setup with Intuit that will help make this easier.

Again, we understand this is not ideal for any of the parties involved but we all must react.

Do not panic, you have time to move this. Worst case scenario is you continue to use Quicken through the 1st quarter 2018 and are able to move the data to any of the new programs. Ideally you are setup to use your new program 1-1-18, but that is a stretch unless you react ASAP.

We hope this helps provide a bit of clarity moving forward.

As always, we appreciate the trust you have placed in our Firm. Happy Holidays!!!!

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