

### **Important Announcement About Microsoft Money**

Dear Microsoft Money Financial Institution Partner,

With banks, brokerage firms and Web sites now providing a range of options for managing personal finances, the consumer need for Microsoft® Money Plus has changed. After suspending annual updates of Money Plus in 2008, Microsoft is announcing that we will no longer offer Microsoft Money Plus for purchase after June 30<sup>th</sup>, 2009. This includes Microsoft Money Essentials, Money Plus Deluxe, Money Plus Premium, and Money Plus Home & Business.

The [www.Microsoft.com/money](http://www.Microsoft.com/money) website will make this announcement and provide other details for end users on June 11<sup>th</sup>. Online services, including support of OFX will continue through January 31, 2011. While we will not certify new financial institutions for connectivity to Money, we will continue to support the connectivity and branding needs of our existing partners until January, 2011.

Attached to this note is a list of questions we anticipate customers will ask. You will want to pass this on to your support team so they can be better prepared to answer customer questions.

Microsoft remains committed to helping customers chart a course to financial well-being. The MSN Money Web site will continue to provide personal finance information and advice plus comprehensive market news and quotes. We will continue to evolve and enhance the online MSN offering in the coming months.

We would like to thank you for being a loyal Money financial institution partner by providing connectivity to our mutual customers.

If you have further questions about these changes, please contact us at your convenience.

Again, we thank you for partnering with Microsoft.

Sincerely,

Microsoft Money

Microsoft Money statement and FAQ

Statement (will appear on Microsoft.com/money homepage):

***Important notice: Microsoft Money Plus will not be available for purchase after June 30, 2009. All purchased Money Plus products must be activated prior to Jan. 31, 2011.***

With banks, brokerage firms and Web sites now providing a range of options for managing personal finances, the consumer need for Microsoft Money Plus has changed. After suspending annual updates of Money Plus in 2008, Microsoft is announcing today that we will no longer offer Microsoft Money Plus for purchase after June 30, 2009.

We would like to thank the many dedicated users who have been enthusiastic supporters of Microsoft Money over the years, as well as our partner financial institutions who helped pioneer a digital vision of financial management.

Microsoft remains committed to helping customers chart a course to financial well-being. The [MSN Money](#) Web site will continue to provide personal finance information and advice plus comprehensive market news and quotes. We will continue to evolve and enhance the online MSN offering in the coming months.

Current Money Plus customers who have questions or concerns can find additional information [here](#).

FAQ:

### **Frequently Asked Questions about the Microsoft Money end of sales**

Why are sales of the Microsoft Money product coming to an end?

***The category of personal financial-management software has changed considerably in the 17 years since Money was first established. As more users shift their attention to full-service offerings provided by banks and brokerages, demand for a comprehensive personal finance toolset has declined.***

What products are affected?

***Products affected include:***

***Microsoft Money Essentials  
Microsoft Money Plus Deluxe  
Microsoft Money Plus Premium  
Microsoft Money Plus Home & Business***

If I'm a Money Plus user, do I have to quit using Money when my current version expires?

***No. Online services (described below) will no longer be available, but Money has many features that continue to work after the online services have expired. (For Money Plus Deluxe, Premium and Home & Business customers, online services expire two years after initial activation or Jan. 31, 2011, whichever is earlier; for Money Plus Essentials it is one year after activation or Jan. 31, 2011, whichever is earlier. You can verify your expiration date in Money Plus by selecting Help / About***

*Microsoft Money; it appears to the right of the serial number.) As long as your product was already activated, you'll be able to keep using the product after online services have expired. Note, Money Essentials is not designed to be usable once online services have expired.*

How long can I keep using Money Plus?

*An expired version of Money Plus could be used indefinitely on the computer and configuration currently in place, with the exception of the services and features as noted below. Compatibility with future operating systems and hardware configurations cannot be guaranteed.*

What happens to yearly Tax updates after sales have ended?

*Microsoft plans to support online services (including updates to rates & tables) for active customers through at least January 2011. If yearly tax updates end, however, users can still manually update the tax rates. (Verify current rates from tax rate schedules on the [IRS Web site](#). In Money, go to Tools / Settings / Tax Settings. Click "Set your filing status and view tax rates by income bracket." Modify the data to match the correct tax year values.)*

When do online services expire?

*Per the End User License Agreement for Money Plus Deluxe, Premium and Home & Business products, online services continue for two years after initial activation or until 1/31/2011, whichever comes first.*

The Money Plus End User License Agreement says that online services last 2 years or until 1/31/2011, whichever is earlier. I just bought Money, and the product notification says my services last until 6/08/2011. Which is correct?

*The End User License Agreement date is the correct date.*

If I buy Money now, will I get 2 years of service?

*No, as per the current End User License Agreement, online services for Money Plus Deluxe, Premium, and Home & Business products continue until 1/31/2011.*

My version of Money came with 2 years of online services. Can I extend my online services?

*After the end of sales date (June 30, 2009), you will not be able to purchase a new or extended version of the online services.*

What happens when my online services have expired?

*When online services expire, Money no longer supports online quotes nor direct online banking (including bill-pay). Money can still process bank statements imported from your bank's Web site (if available), and quotes can be manually updated. The following support articles may be helpful:*

*[How to troubleshoot issues that you may experience when you try to download and import a statement from your financial institution into Money](#)*

*[How to re-associate an Online statement to the appropriate Microsoft Money account](#)*

*[How to troubleshoot error messages that you may receive when you import OFX statements into Money](#)*

Can I get quotes after online services expire?

*No. Online quotes are part of the online services. Users can still manually update quote prices once online services have expired.*

What happens to bill-pay functionality?

*Epay and Apay services will no longer be available from within the Money product after online services expire (which for Money Plus Deluxe, Premium and Home & Business customers is two years after your initial activation or Jan. 31, 2011, whichever is earlier; for Money Plus Essentials it is one year after activation or Jan. 31, 2011, whichever is earlier). This change does not impact you if you pay your bills through your bank's Web site. You can also still access Checkfree bill-pay through MSN Money. (Note: Some customers currently pay a fee to their bank to make online statements available through Money Plus for online bill-pay; those customers should contact their bank and discontinue that delivery once online services have expired.)*

I have Money Plus Home & Business. What business features will change?

*The same online services expire for all versions of Money Plus, including Home & Business.*

I am Money 2007 user. Should I upgrade to Money Plus before sales end?

*If you are still using Money 2007, it is not recommended that you upgrade to Money Plus at this time.*

I am a Money 2006 or earlier user. What should I do?

*If you are still using Money 2006, it is not recommended that you upgrade to Money Plus at this time.*

What product support will be offered for Money Plus?

*Support will be available through Jan. 31, 2011. Refer to <http://support.microsoft.com/lifecycle/> for general Microsoft product support information and <http://support.microsoft.com/lifecycle/?C2=870> for specific information about Money Plus. Product Activation will be supported through Jan. 31, 2011. Once the product activation service is no longer available, Money cannot be set up in a new configuration.*

What if I get a new computer and need to reinstall?

*The license agreement describes some limitations for setting up Money on different computers. To use Money on a different computer, you will need to have the original media you first used to set up Money (either the original CD, or the original setup program you received when you purchased Money Plus online), and your activation code. Money will need to be activated on the new computer before Jan. 31, 2011.*

The EULA says I can only install on 2 computers. Can I uninstall on one, and install on another?

*Yes, you may do that using your original installation method (CD or download).*

If I have to activate Money Plus, can I do that after online sales end?

*Yes, you can activate after sales have ended. Activation must take place before Jan. 31, 2011.*

I purchased the optional Extended Download Service when I bought Money online. What happens to that? How long will my extended download be supported?

*The Extended Download Service provides multiple downloads of software purchased in a single order for a period of two years from the date of purchase. [Click here](#) for full details.*

Can I install and use Money on future computers I may buy?

*Yes, as long as you activate the new installation before Jan. 31, 2011. Keep a copy of the original media and activation key. As previously noted, some features will not work once online services have expired.*

What alternatives do I have if I want to stop using Money Plus immediately?

*A number of online personal finance management and planning tools are available, many for free, on the Web. Other software solutions may be for sale from companies other than Microsoft. For general account information and transactions, your bank Web site may provide the best solution.*

How do I export my data?

*Account transactions from banking and investing accounts (not to include loans) can be exported using QIF Export (see Money Help for more information). Another method used is to create 3 custom transaction reports covering all dates: One for Loans, one for Investments, and one for regular accounts. For each report, export to Excel or to XML. Not all of your data outside of core account information may be able to be exported, however -- for instance, the bill list, favorite reports, household inventory, budgets and cashflow forecasts will not export. The following support articles may be helpful:*

*[How to view Money data in Excel](#)*

*[How to export and import account information in Microsoft Money](#)*