



DOWNLOAD & ACTIVATION PROCEDURE: Desktop Edition

Step 1

Download Software

- ① If you haven't already downloaded the program, [click here](#)
 - a) If you are currently activated and are just updating your program, you will not lose your activation.
 - b) When given the option to Run or Save, click Run.
 - c) If you get a "not commonly downloaded" warning, click Actions, More Options, Run Anyway.
- ② Follow the on-screen prompts to complete the download. (i.e. accept terms, click Next as prompted, Finish, etc.)
 - If you are only using the 14-Day Free Trial, you do not need an activation code and the program is available for use immediately upon download.
 - If you have purchased a Personal Plus or Professional edition, these require activations so please proceed with the activation instructions below.

Please Note:

- ❖ Works on Windows 7, 8 & 10 computers
- ❖ **If you use a Microsoft Surface tablet or Google Chromebook, you'll need to use our [web edition](#).**
- ❖ Due to the high level of security, government computers will likely block the installation of this software and may need a dedicated port during activation.

Step 2

Request Activation

- ① Double click the program icon that is now on your desktop to open the program
- ② Click on the **red** Activation tile on the *Home Screen*
- ③ Select license edition (*radio button at the top*)
 - If Professional, enter advisor information and click OK
- ④ Request an activation code (*in the Request the Code section*)
 - a. Enter PayPal Transaction ID (*or name of purchaser*)
 - a. If a Personal Plus: enter first name, last name and email address
 - b. If a Professional: enter email address where you would like your code sent
 - c. Click Submit**
- ⑤ You will receive an email with two activation codes
**** If email fails, click "Copy Request" button & paste all information in an email to ActivationDepartment@FedRetireSoftware.com**

Step 3

Enter Activation Codes

- ① Enter Activation Codes (*in the Enter the Code section, must be exact*)
 - a. Customer ID: **XXXXXXXX**
 - b. Activation Code: **XXXXXXXX**
 - c. Click Submit
- ② Program will automatically restart to complete activation process