



LICENSE TRANSFER PROCEDURE:

Desktop Edition

Please Note:

If you are a Professional user and you want to transfer your client files also, please be sure to back them up to a thumb drive prior to deactivating the old computer. The software has a backup feature to assist in this process - you'll find those instructions by clicking on the name of the form at the top of the Professional screen (backup instructions are at the 1:59 mark):



Step 1

Deactivate Software

- ① Close the program
- ② [Click here](#) to deactivate your license.

Step 2

Confirm Deactivation (License cannot be transferred until this step is complete)

- ① Send a confirmation of deactivation
 - a. Click on the **red** Activation tile on the *Home Screen*
 - b. Select Personal Plus Activation (*radio button at the top*)
 - c. Enter "Deactivation Confirmation" in PayPal Transaction ID
 - d. Enter first name, last name and email address
 - e. Click Submit**

Step 3

Reactivate Software

- ① [Click here](#) to download the program on the new computer.
- ② Double click the program icon that is now on your desktop to open the program
- ③ Click on the **red** Activation tile on the *Home Screen*
- ④ Select license edition (*radio button at the top*)
 - If Professional, enter advisor information and click OK
- ⑤ Request an activation code (*in the Request the Code section*)
 - a. Enter "License Transfer" in PayPal Transaction ID
 - b. If a Personal Plus: enter first name, last name and email address
 - c. If a Professional: enter email address where you would like your code sent
 - d. Click Submit**
- ⑥ You will receive an email with two activation codes
- ⑦ Enter Activation Codes (*in the Enter the Code section, must be exact*)
 - a. Customer ID: **XXXXXXX**
 - b. Activation Code: **XXXXXXXX**
 - c. Click Submit
- ⑧ Program will automatically restart to complete activation process

** If email fails, click "Copy Request" button & paste all information in an email to ActivationDepartment@FedRetireSoftware.com