



GENERAL BULLETIN

CONNECTICUT
BANKERS
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SENT TO:

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July 2, 2010

TO THE CHIEF EXECUTIVE OFFICER
OR INDIVIDUAL ADDRESSED

CEO, CEO+, CFO, CIO,
COO, Branch, Retail

RE: Online Financial Management Endorsement

Intuit Financial Services (formerly Digital Insight) helps banks grow by making it easier for consumers and businesses to manage their money. The company's portfolio of on-demand solutions and services are built on insights gained over three decades working with customers and creating innovative offerings that anticipate their needs. More than 9 million consumers and businesses use Intuit Financial Services solutions through its nearly 1,900 financial institution clients.

FINANCEWORKS

FinanceWorks helps deepen relationships with your most valuable customers by making your online banking channel more relevant to their financial lives. You become the trusted financial advisor by enabling consumers to aggregate account data across more than 16,000 financial institutions so they can simplify money management and make better financial decisions.

FINANCIAL INSTITUTION BENEFITS WITH FINANCEWORKS

- Capture and retain your most profitable customers
- FinanceWorks users are, on average, 4 times more profitable than non-FinanceWorks users
- Increase the frequency and length of visits to your Web site
- FinanceWorks users login to Internet Banking twice as often as active Internet Banking users.
- Increase customer acquisition
- 78 percent of end users surveyed said they would recommend their financial institution.

CUSTOMER BENEFITS WITH FINANCEWORKS

- Manage their financial accounts across 16,000+ institutions all in one place
- Analyze spending behavior and find ways to save
- Ensure bills are paid on time
- Simplify managing a budget and help reduce debt
- Track business income and expenses in their personal accounts

FinanceWorks can be integrated with any bank's online banking system— even those that don't use Intuit Financial Services' Internet banking platform.

TURBOTAX® FOR ONLINE BANKING

TurboTax® for Online Banking is an enhanced version of TurboTax Online, fully integrated within a bank's Internet Banking platform. Users seamlessly access TurboTax Online by simply signing into Internet Banking and clicking on the TurboTax Online access point. TurboTax Online is then launched as a frame within a bank's Internet Banking platform.

CUSTOMER BENEFITS

- Saves time and prevents errors
- Secure data transfer to TurboTax Online means less manual data entry and fewer mistakes.
- Fast tax refunds
- Easy direct deposit to bank account gets your customers their refund in the fastest way possible.
- Save money
- Your customers can complete their simple federal return for free, or receive a 15 percent discount on TurboTax Online paid federal editions.

FINANCIAL INSTITUTION BENEFITS

- A greater share of tax refund deposits for your bank
- More than 90 percent of people who tried TurboTax for Online Banking during pilot testing who received a tax refund direct deposited that refund with the financial institution that offered the service.
- Helps build deeper relationships and trust with customers
- Increases use of Internet Banking

HOW TO PARTICIPATE

For more information about the Online Financial Management endorsement by the CBA, please contact Ernie Buday, (770) 349-1273, ernie.buday@digitalinsight.com, or visit <http://ifs.intuit.com>.

Should you have any questions regarding the CBA Endorsement Program, please don't hesitate to contact me.

Sincerely,

COLLEEN E. CLANCY
Vice President