



# TurboTax<sup>®</sup> Online

Strengthen customer engagement with easy access to a leading tax solution with a discount that your customers will appreciate.



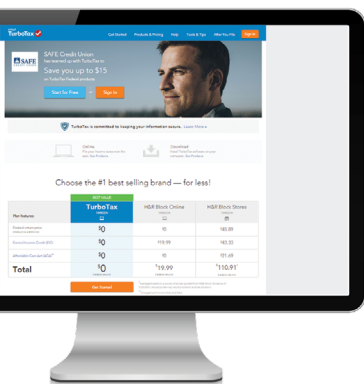
## Financial Institution Benefits

- **Increase customer loyalty and referrals**  
Customers are more likely to recommend your financial institution to a friend; 85 percent favor your financial institution because of your TurboTax offering.<sup>1</sup>
- **Grow profitable low-cost deposits**  
Over 96 percent of customers used the direct deposit feature in TurboTax<sup>1</sup>; 85 percent deposited, on average, \$2,711 in tax refunds with their host financial institution.<sup>2</sup>
- **Maximize cross-sell and up-sell opportunities**  
Advertise your own products and services to your customers from within TurboTax (IRA's, loans, credit cards).
- **Strengthen your position as a trusted advisor**  
Stay at the center of your customers' financial lives by providing the #1 best-selling and most trusted tax software; there's no reason for them to go anywhere else!
- **Offer your customers a discount on TurboTax products**

*"It was easy to complete and the questions asked allow me to complete my returns with confidence."*

-TurboTax customer

TurboTax Online, and related marketing support, is provided as a value-add, no cost service to your financial institution. Your customers will be routed to your branded TurboTax Online microsite via the (optional) Marketing Program emails, prompts and banners, in addition to the standard access points within Online Banking.



## Customer Benefits

- **Speed and accuracy** – Prior year's tax data pre-populates for returning users; plus, TurboTax can get your IRS documents electronically from over 400,000 companies, and put the information in the right forms.
- **Fast tax refunds** – Easy direct deposit option gets your customers their refund in the fastest way possible.
- **Simple to use** – TurboTax coaches users every step of the way, automatically double checking along the way, to provide reassurance that your customers' taxes are done right.
- **Social Network** – A Facebook "Like" button appears after tax filing so that customers can share their great experience about their financial institution.

## Features

- TurboTax Online can be accessed from within Online Banking, Marketing Program emails, prompts and banners, plus anywhere else that you choose to promote your unique URL to your institution's microsite.
- Access to all prior year tax data for returning TurboTax Online users.
- Accessible on iPad® or Android™ tablet devices.

## Free Marketing Support

Digital Insight offers a free comprehensive end-user marketing program for TurboTax Online to maximize participation and tax refund deposits to your financial institution.

The right marketing mix drives the strongest results for financial institutions.

Last season's Sweepstakes campaign generated a 48 percent lift when compared to financial institutions that did not participate in the TurboTax Marketing Program.<sup>3</sup>

## Marketing Program Overview

**Tax Year 2015 Campaign Dates: December 17, 2015 - April 18, 2016**

Choose the featured sweepstakes or the standard marketing campaign.

Both campaign options feature:

- Online banners, prompts and emails developed and launched on your behalf.
- Self-serve marketing, including flyers, statement stuffers, banners, and messaging that you can customize to extend your reach.
- Staff-readiness tools that help you prepare your front-line staff.

## Get Started

Learn more and register to participate on the Admin Platform (Nov 1, 2015):

**Admin Platform > Marketing > Registration**

Financial institutions that participated in last tax season's marketing program (Tax Year 2014) are automatically registered for the upcoming tax season and do not need to register again.

TurboTax is a registered trademark of Intuit Inc., registered in the United States and other countries.

iPad is a trademark of Apple Inc., registered in the U.S. and other countries.

Android and Google Play are trademarks of Google Inc.

<sup>1</sup> Tax Year 2014 TurboTax Online Exit Survey

<sup>2</sup> IRS Filing Season Statistics for Week Ending April 26, 2015

<sup>3</sup> Tax Year 2014 TurboTax Online End of Season Analytics

Banks and credit unions turn to Digital Insight for innovative online and mobile banking technologies that drive growth. For nearly 20 years, our leading solutions have helped financial institutions engage consumers more meaningfully and more profitably.

[digitalinsight.com](http://digitalinsight.com) | 888-344-4674

