

TurboTax Program Overview

Program Overview

- **Offer your members savings on TurboTax products**
- **Provide members with direct access to expert tax resources at TurboTax**
- **Accentuate your brand on the customized microsite**
- **Best-in-class client management support from CU Solutions Group staff**
- **FREE marketing materials provided by CU Solutions Group**

Tax Reform

Tax Reform

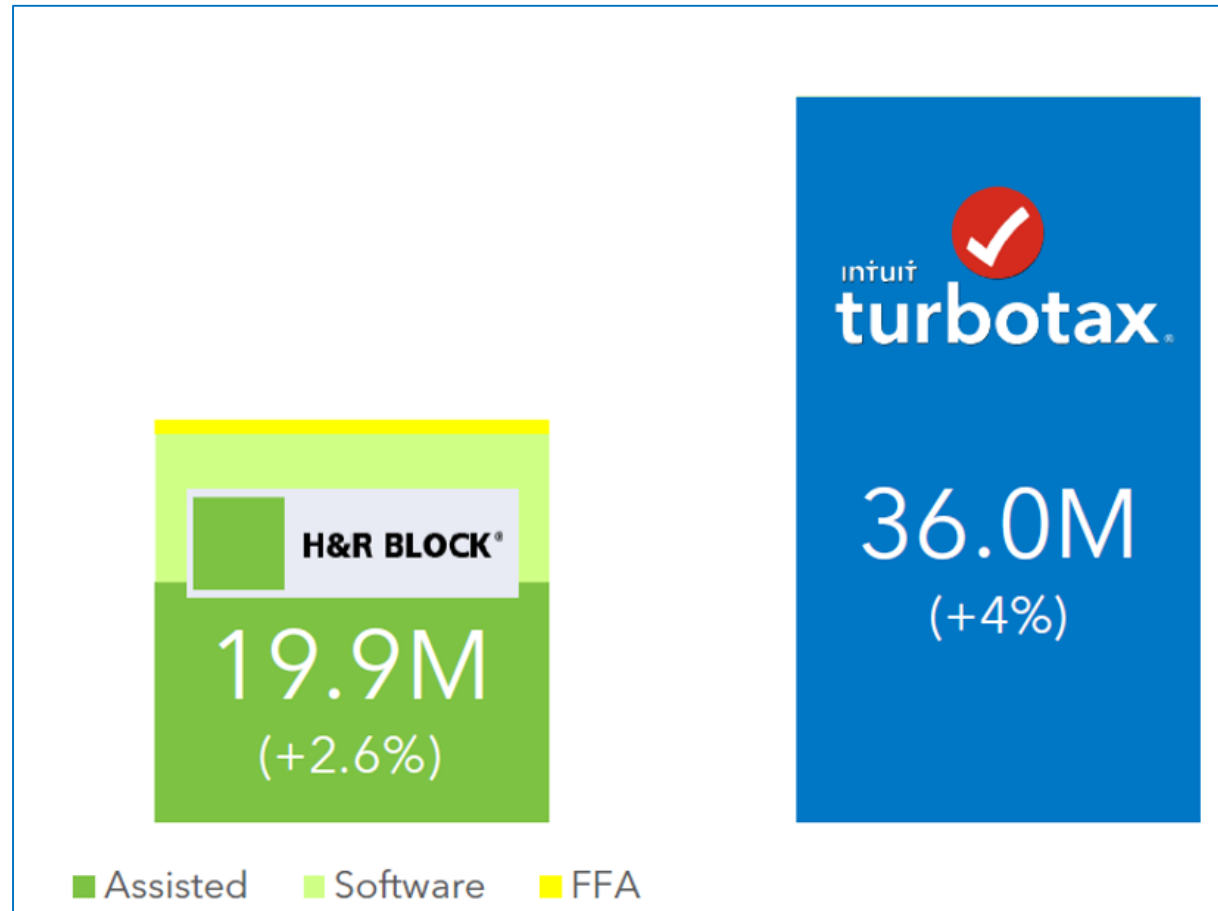
- The new tax reform law brings a number of changes that will impact taxpayers and this presents an excellent opportunity for your credit union to offer financial education in a meaningful and effective way
 - Guide your members through how the tax reform may impact their filing
 - Highlight other tools that you may be able to provide to assist them
- **Tax Information Page**
 - CU Solutions Group has launched a **Tax Information Page**, in the [Partner Center](#) at www.lovemycreditunion.org, that provides tax reform content that you can share with your members.
- **TurboTax has your members covered**
 - TurboTax is up to date on the latest tax laws and guarantees 100% accurate calculations so your members can be confident that their taxes are done right, and get their biggest possible refund.



Why TurboTax

The definitive leader do-it-yourself tax software

130M returns were processed by the IRS last tax season.
36M of those were filed using TurboTax.





A broad range of credit unions have partnered with CU Solutions Group to enhance their member value and build loyalty.

“

The TurboTax discount is a great value to our members. Any time we can save them money on a great product, we take advantage of it because it's in line with what we do. If they're going to do taxes, why not save them money on it?

Todd Pietzsch

Manager of Public Relations, BECU

Member Savings

Increase the value of membership

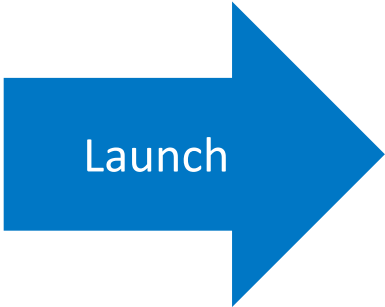
- Last tax season over 227,000 members saved over **\$1.6M** with the TurboTax credit union member discount



Total Member Experience Process

We Work **with** You

- 1 Custom Co-branded Microsite Created
- 2 Strategize on Optimal Marketing Plan
- 3 Marketing Plan Executed by Your Credit Union



TurboTax Works **for** You



Program Benefits

Credit Union Benefits



Credit Union

- Offer savings to your members of up to \$15 on TurboTax products
- Drive member loyalty and enhance the value of membership
- Promote your products & services on your microsite
- Capture refunds – grow deposits investments
 - **Over \$239B of refunds were direct deposited with financial institutions last tax season**

Benefits for Your Members

- Discount on TurboTax products
- Taxes done right, 100% guaranteed
- Expert help, live on-screen
- Auto-import W2 and other tax forms (including 109x)
- Secure & protected
- Sweepstakes Drawing



Member Discount



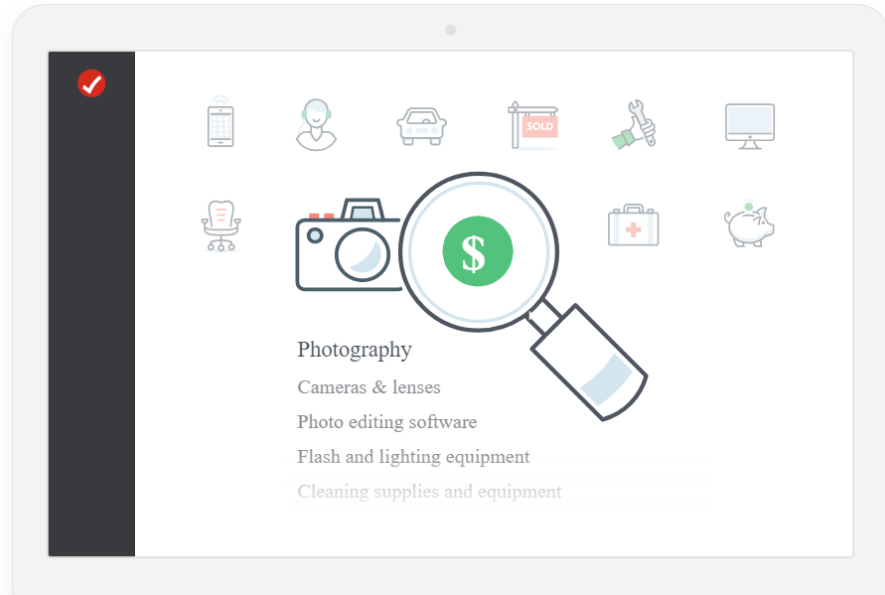
Member discount is available the entire tax season

- \$5 savings on the Deluxe federal product
- \$10 savings on the Premier federal product
- \$15 savings on the Self-Employed product
- \$15 savings on TurboTax LIVE

Self-Employed Product

Uncover industry-specific deductions

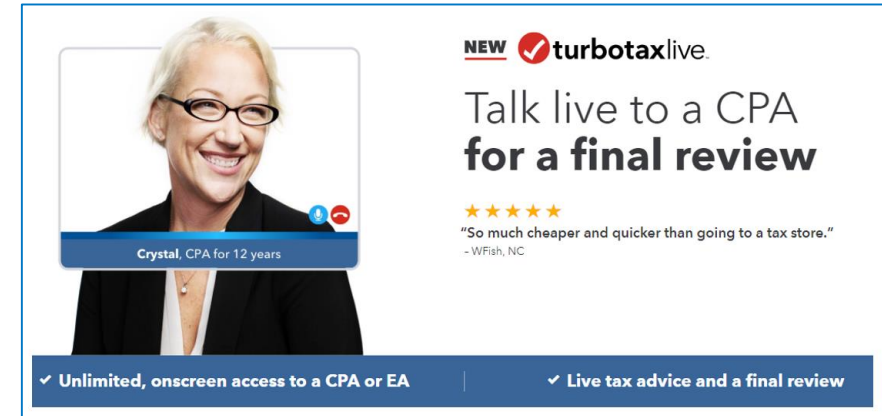
Maximizes unique deductions across diverse industries: real estate, rideshare, web design, creative & performing arts, construction and more.



Perfect for independent contractors and businesses

Find more tax deductions so you can keep more of the money you earn with **TurboTax Self-Employed.**

TurboTax Live Product



One-on-one review with a TurboTax CPA or EA before you file

Unlimited live tax advice from experienced tax experts by your side

Quickly connect to a CPA or EA on your computer screen as often as you'd like

100% Accuracy Guarantee

We're in your corner with tax tips and advice

Covers personal and work income, including complex situations

Customized Microsite - Home Page Example

intuit
turbotax.

Products & Pricing Tools & Tips After You File Help Security

Sign In

desert
FINANCIAL
CREDIT UNION

Desert Financial Credit Union has teamed up with TurboTax

Save up to \$15

on TurboTax federal products

We make it easy to transfer last year's tax info.

Start for Free Sign In

	MOST POPULAR			
Free Edition	Deluxe	Premier	Self-Employed	NEW turbotaxlive.
Simple tax returns (1040EZ/1040A)	Maximize tax deductions and credits	Investments and rental property	Personal & business income and expenses	CPA or EA advice and a final review
\$0	\$59.99 \$54.99*	\$79.99 \$69.99*	\$119.99 \$104.99*	\$179.99 \$164.99*
State additional	State additional	State additional	State additional	State additional
Start for Free Pay only when you file	Start for Free Pay only when you file	Start for Free Pay only when you file	Start for Free Pay only when you file	Start for Free Pay only when you file

Crystal, CPA 12 years

Your logo and credit union name prominently displayed

Sweepstakes

Increase usage of TurboTax and give members a chance to win!

Theme	“\$25,000 Payday Sweepstakes”
Campaign Dates	December 10, 2018 – February 14, 2019
Entry	Members are automatically entered into the sweepstakes when they start their TurboTax return, from the credit union microsite, before February 14th and provide a valid email address.
Prizes	1 Grand Prize winner: \$25,000 12 First Prize winners: \$1,000 each
Marketing Materials	Sweepstakes marketing materials will available and include: <ul style="list-style-type: none">• Email templates, web banners, newsletter messaging, social media, lobby materials, e-statement banners and messaging, mobile app banners
Marketing Requirement	Sweepstakes messaging in newsletter before 2/08/19, preferred placement in your January newsletter
Deadline for Participation	November 09, 2018 is the last date to enroll in TurboTax and be included in the Sweepstakes

Employee Discount



Love My Credit Union Rewards offers credit union employees a special discount on TurboTax to show our appreciation for supporting the TurboTax program.

- Employee Savings
 - \$10 off the Deluxe federal product
 - \$15 off the Premier federal product
 - \$20 off the Self-Employed federal product
 - \$20 off TurboTax Live federal product

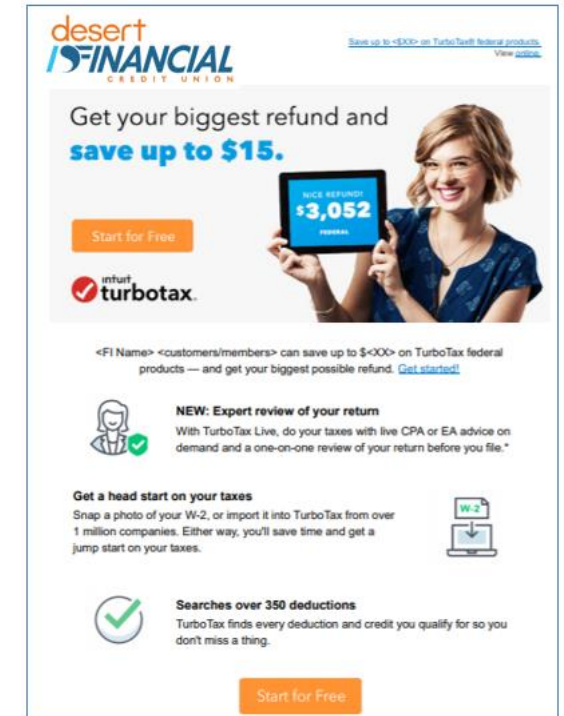
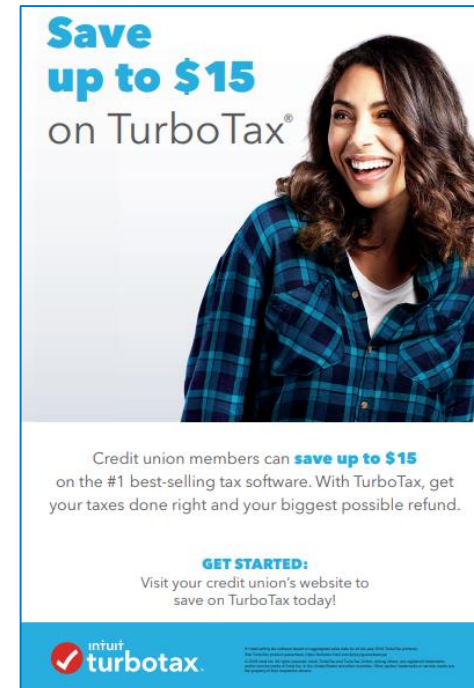
Visit <http://turbotax.intuit.com/affiliate/lmcuremp> to access the employee discount

Marketing TurboTax

Best In Practice Marketing

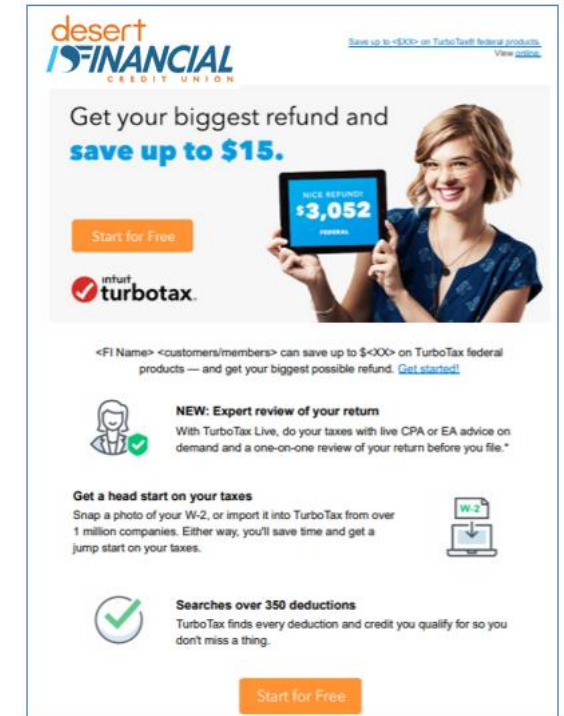
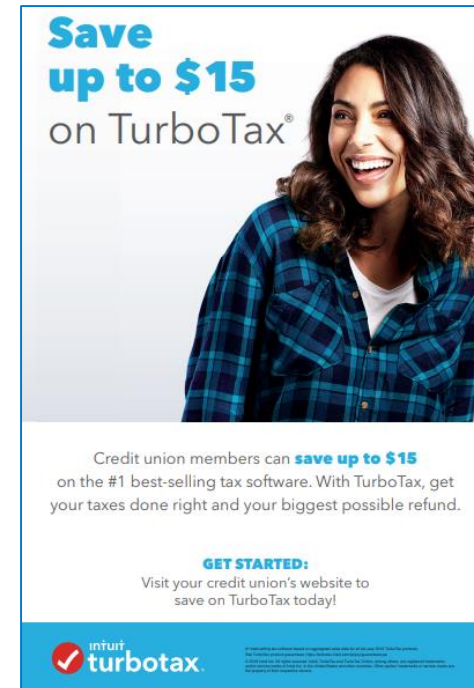
Reach your members effectively and build awareness of the TurboTax credit union member discount

- **Website banner** - TurboTax banner placed on credit union website **home page**, above-the-fold, during the period of **January 1 - April 15th**
- **Online banking banner** - TurboTax banner or text link placed on the online banking pages, home page and behind login, during the period of **January 1 - April 15th**
- **Email Communication** – Two dedicated TurboTax email messages sent to members on **January 9th** and **January 23rd**
- **Sweepstakes Communication** - Newsletter article featuring the TurboTax sweepstakes included in January newsletter



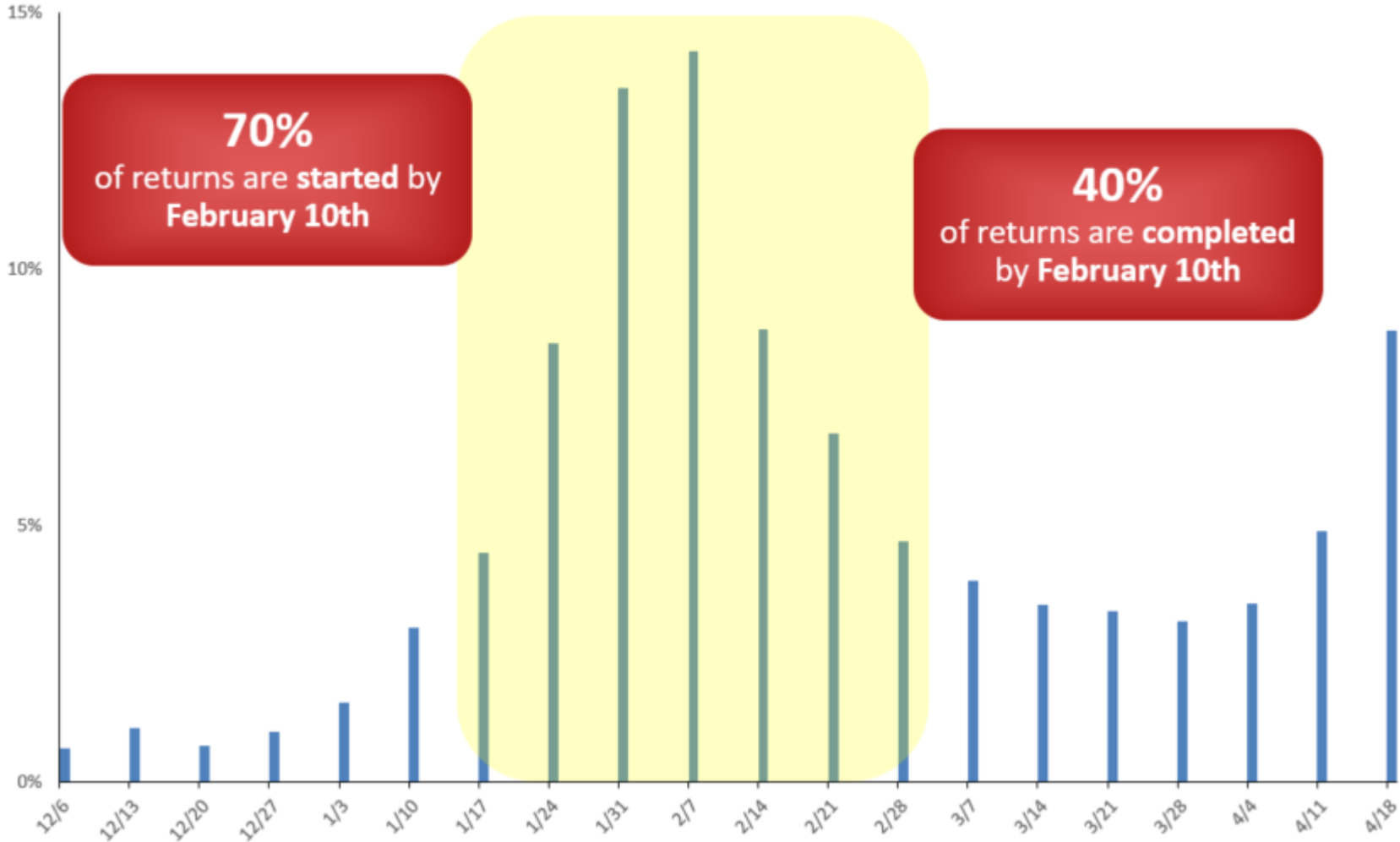
Additional Optimal Marketing

- **Mobile app banner** – Include TurboTax banner or messaging on credit union mobile app.
- **Year End Statements** – Place a TurboTax banner or message on year end statements. Relevant to filing taxes.
- **Tax Statements Page** – Place a TurboTax banner on the tax statements page
- **E-statements Page** – Place a TurboTax banner on the e-statements page of your website
- **1099 Forms** – Include TurboTax banner or message on 1099 forms or in communication
- **Lobby Materials** – Place lobby posters in branches Jan 1 thru April 15th
- **Social Media** – Place posts on FB, Twitter, blog, etc.
- **Key Word Search** - Implement tax keywords into web site search function



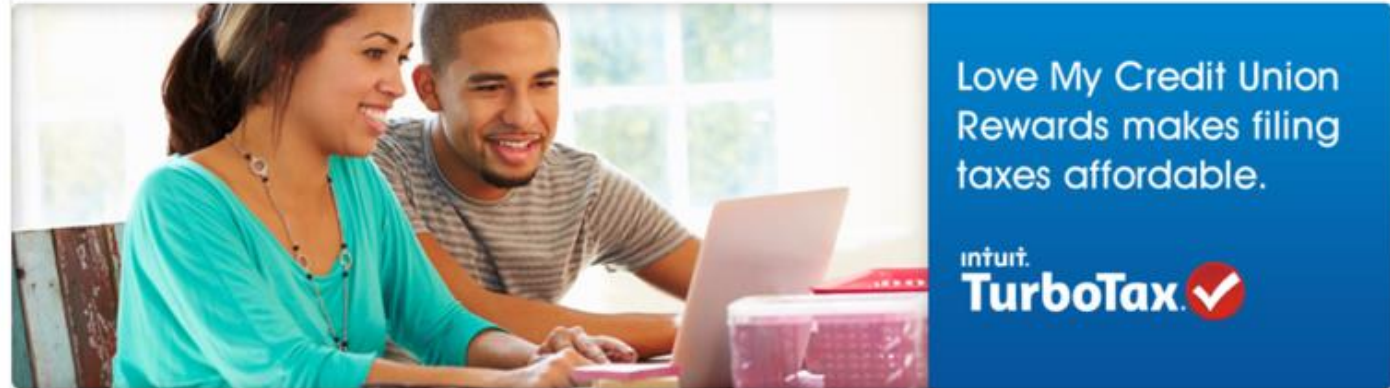
Marketing Best Practices - Timing

Early season marketing is the key to building member awareness of your discount.





FREE Marketing Tools and TurboTax Brand Assets

- Free marketing materials available in the [Partner Center](#) at www.lovemycreditunion.org
- Marketing materials will be available mid-October
- Email notifications will be sent to credit unions when marketing materials are posted



TurboTax program marketing materials

Web Banners	Onsert Artwork
Emails	ATM Ads & Receipts
Newsletter Ads & Articles	Envelope Snipes
Social Media  	Statement Messaging
Logos	
Lobby Materials - Digital / Video	
Posters & Print Lobby Materials	

Next Steps

- **Enroll**
 - Visit the [Partner Center](#) at www.lovemycreditunion.org
- **Questions**
 - Contact clientsupport@cusolutionsgroup.com or by phone at 866-348-2887

Summary

- Offer your members savings on TurboTax products
- Provide members with direct access to expert tax resources
- Accentuate your brand with a customized microsite
- Best-in-class client management support
- FREE marketing materials