

# Love My Credit Union Rewards

Maximizing Benefits: Exploring Tax Services and Estate Planning



Love My  
Credit Union®  
rewards



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rewards

Love My Credit Union Rewards is a nationwide affinity program operated by CUSG that serves 1,400+ credit unions with more than 58 million members.

Collectively, LMCUR has saved over 9 million members more than **\$2 billion** on products and services and delivered more than \$120M to our credit union and league partners.

Partnering with Love My Credit Union Rewards allows your credit union to provide members with more ways to save and improve their financial well-being, and more reasons to be a member of your credit union.



# Tax Services



# Tax Filing at a Glance



Income Tax  
Returns Processed



**144M**

**93.9M** Filers received  
a tax refund

**86.6M** Number of Direct Deposit  
Refunds

**\$256B** Amount of Direct Deposit  
Refunds

**\$2,960** Average Refund

## Tax Solutions for Every Member

Provide your members with expert tax help and special member savings on TurboTax and H&R Block tax prep services.



- For over 14 years, Love My Credit Union Rewards has offered members a discount on the #1 best-selling Do-It-Yourself (DIY) tax software.
- 40M+ filers use TurboTax



- In 2022, Love My Credit Union Rewards enhanced its Tax Services program by adding H&R Block to offer members additional options and savings.
- 20M+ filers use H&R Block

## Benefits for your credit union



### **Add value for members**

Offer members discounts on TurboTax and H&R Block products

### **Strengthen position as a trusted advisor**

Stay at the center of members' financial lives, helping them get their taxes done right and get answers to tax questions

### **Increase member engagement**

TurboTax and H&R Block gives members (and prospects) more reasons to engage with credit unions

### **Help members get their maximum refunds**

TurboTax and H&R Block provide 100% accuracy and maximum refund guarantee

### **Drive Tax Refunds back to your credit union**

Promote direct deposit to grow investments and deposits

# Benefits for your members

## *File your way and save*



- America's #1 tax preparation provider
- **Save 20% on TurboTax federal products**
- Online tax prep, DIY or with expert help
- Year-round support from tax experts when using the Live products
- Member discount is built into the product pricing on your co-branded TurboTax microsite



- Unmatched tax expertise since 1955
- **Members that are new to H&R Block save \$25 on professional tax prep**
- **Returning members to H&R Block save \$10 on professional tax prep**
- Walk-in, make an appointment or drop off your documents and get your taxes done
- 12+K retail locations worldwide / 5 miles to tax help
- Member discount coupon is available on the co-branded LMCUR tax services page

# TurboTax Member Flow

Credit union digital marketing drives members into the LMCUR Tax Services landing page or directly into your co-branded TurboTax microsite

## LMCUR Tax Services Landing Page

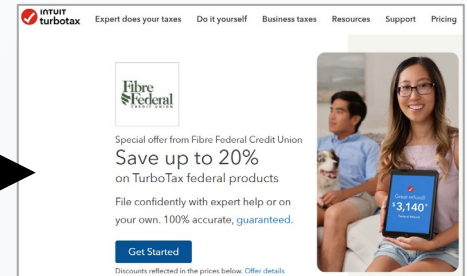
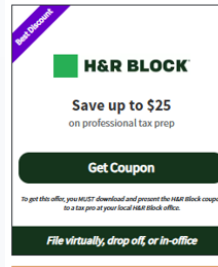
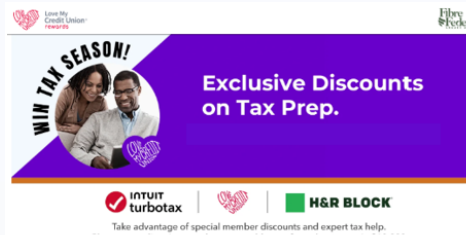
- Co-branded landing page featuring your credit union logo
- TurboTax and H&R Block offers presented and sweepstakes entry
- Clicks on the TurboTax CTA will take your members into your credit union's TurboTax microsite

## TurboTax Credit Union Microsite

- **Members must log in or sign up** through your credit union microsite link to get the member discount
- The co-branded microsite features the member discount and your credit union logo
- The microsite helps members find the right TurboTax solution and guides them through step-by-step

## Member Discount

- The member discount is automatically built into the product pricing on the co-branded microsite





# H&R Block Member Flow

Credit union digital marketing drives members into the LMCUR Tax Services landing page or directly into your co-branded TurboTax microsite

## LMCUR Tax Services Landing Page

- Co-branded landing page featuring your credit union logo
- TurboTax and H&R Block offers presented and sweepstakes entry
- The H&R Block section includes a “Get Coupon” CTA

## H&R Block Coupon

- When members click on the “Get Coupon” button they will receive two codes, one for a NEW customer and one for a PRIOR customer.
- Members can save or download the coupon and click through to make an appointment.
- In-person: members can walk into an H&R Block office or make an appointment.
- Virtually: Member can drop off their documents at a local office or send the documents virtually and let H&R Block do the rest.

## Member Discount

- Members **must present the H&R Block coupon** to their tax pro prior to completing their taxes to receive the discount

The image displays a three-step digital marketing flow for H&R Block members.   
1. **Landing Page:** A purple banner reads "WIN TAX SEASON! Exclusive Discounts on Tax Prep." It features logos for Intuit TurboTax and H&R Block, and a "Get Coupon" button.   
2. **Coupon Selection:** Two coupon options are shown. The first is for H&R Block: "Save up to \$25 on professional tax prep" with a "Get Coupon" button. The second is for Intuit TurboTax: "Save 20% on TurboTax federal products" with a "Get Coupon" button.   
3. **Member Discount Page:** The final step shows a "Credit Union Member Discount" page. It offers two coupon codes: "\$25 off professional tax prep" for New Clients (code 970645393) and "\$10 off professional tax prep" for Prior Clients (code 969199968). Below the coupons are buttons for "Email or SMS Coupon", "Save & Download Coupon", and "Make an Appointment".

# Marketing Support

## MARKETING MATERIALS

A wide variety of free, high-quality marketing materials are available in the Partner Center to assist our credit union partners in marketing the TurboTax and H&R Block offers to your members.

Web banners, emails, display ads, social, blog content, and more to help create a marketing plan that works best for you and your members.

All marketing assets in the Partner Center have unique HTML coding and custom click URLs to provide members with access to the exclusive offer while giving you visibility on traffic and member sales.

The image displays four marketing banners for Intuit TurboTax and H&R Block tax preparation services, all featuring the 'Love Credit Unions' logo.

- Top Left Banner:** Features the 'Love Credit Unions' logo in the top left. The main headline reads 'Exclusive Discounts on Tax Prep Services.' Below this, it lists the Intuit TurboTax and H&R Block logos. The text states: 'Fibre Credit Union Members can get exclusive savings on tax prep!' and 'Get special savings on tax preparation services whether you choose to do your taxes on your own or get help from a tax professional. Member savings are valid through 10/15/25.' It then lists benefits for Intuit TurboTax: 'File confidently with TurboTax®, without leaving home.' and 'SAVE 20%', 'Guaranteed maximum refund', and 'Tax experts to help or even file for you'. A red 'File Now' button is at the bottom.
- Top Right Banner:** Features the Intuit TurboTax and H&R Block logos at the top. The main headline reads 'Save Big on Tax Prep!' in large, bold letters. Below this is a purple 'SAVE NOW' button and the 'Love Credit Unions' logo.
- Bottom Left Banner:** Features the 'Love Credit Unions' logo in the top left. The main headline reads 'Exclusive Discounts on Tax Prep.' Below this, it lists the Intuit TurboTax and H&R Block logos. A purple 'SAVE NOW' button is positioned between the logos.
- Bottom Right Banner:** Features a photograph of a family looking at a laptop. The 'Love Credit Unions' logo is in the top right. The main headline reads 'Exclusive Discounts on Tax Prep!' in large, bold letters. Below this, it lists the Intuit TurboTax and H&R Block logos.

Estate Planning  
**trust&will**



# Trust & Will Estate Planning Program



>65%

of credit union members do  
NOT have even a basic Will

Based on National Averages

**trust  
&will**

The leading digital estate planning solution in the US.

- 1,000,000+ estate plans created
- 70% cost savings vs attorney
- Complete plans in 30 minutes, 100% online
- 5-star member support standing by 6-days-a-week
- Available in all 50 states

Secure & Protected



## Benefits for your credit union



- Empower members to take control of their financial future
- Build loyalty through member savings
- Ties in with wealth management/financial advisory services
- **10% revenue share** back to your credit union
- Free marketing materials, educational content, and reporting to track member engagement + ROI
- Strategic marketing support, leveraging analytics from across the industry

# Benefits for your members



## **Exclusive Savings**

**20% discount** off all Trust & Will estate plans. Wills start at just \$159 with member discount.

## **Digital Online Platform**

Simple guided experience – plans can be completed in 30 minutes.

## **Dedicated Support Team**

5-star member support 6-days a week to help members through the estate planning process.

## **Legally Binding**

Plans are built by attorneys and customized by members. Every plan is legally valid, state specific, and created to meet the specific needs of each member.

# Marketing Support

## MARKETING MATERIALS

A wide variety of free, high-quality marketing materials are available in the Partner Center to assist our credit union partners in marketing the Trust & Will products to your members.

Web banners, emails, display ads, social, blog content, and more to help create a marketing plan that works best for you and your members.

Marketing assets are refreshed often keeping content fresh.

All marketing assets link members direct to the Trust & Will Love My Credit Union Rewards platform.



California  
**COMMUNITY**  
Credit Union *grow with us!*

**trust & will**

Easy. Affordable. Secure.

**Members Save 20%**  
on any online estate plan

Love My Credit Union rewards

Your financial wellness is our number one priority. That's why we partnered with Trust & Will and Love My Credit Union Rewards to provide exclusive savings on estate planning. **Get 20% off any estate plan** just for being a [Credit Union Name] member.

Trust & Will is the leading Estate Planning platform offering:

- Convenient, easy-to-use online platform
- Legally binding documents customized to fit your needs
- Best-in-class, top-rated member support
- Fast estate planning – plans can be completed in 30 minutes
- Wills start at just \$159 with member discount

[Get Started](#)



**trust & will**

**Members Save 20%**  
on any online estate plan

[Get Started](#)

Love My Credit Union Rewards



Love My Credit Union rewards

**trust & will**

Easy. Affordable. Secure.

**Members Save 20%**  
on any online estate plan

SCAN QR CODE TO  
LEARN MORE



VISIT [trustandwill.lovemycreditunion.org](http://trustandwill.lovemycreditunion.org)

# Marketing Support



## EMAIL SERVICE

Love My Credit Union Rewards offers a free email service to participating credit unions. Save your marketing department time and resources by having our team:

- Create your co-branded email templates and provide proofs for your approval
- Leverage data to schedule emails for optimal times to maximize member engagement
- Deploy emails on your behalf through a secure and reputable email service provider
- Provide your credit union with email performance metrics

*“Our team has been shorthanded for a few months, and the email service has been a big help for us! Their team has great communication, and the process feels streamlined and organized. I always appreciate them sending over a proof of each email before it is sent for us to review. I highly recommend their email service as it is one less thing for our marketing team to have to worry about!”*

*– David Drew, Honor Credit Union*



# Simplified Enrollment



## GET STARTED TODAY

Partner Center | [PartnerCenter.Lovemycreditunion.org](https://PartnerCenter.Lovemycreditunion.org)

1. Obtain access to the Partner Center at the above link
2. Complete the LMCUR program enrollment form located in the Partner Center
3. Plan your marketing: Access free marketing materials to promote the exciting LMCUR offers to your members
4. Educate your employees and members about the great offers.

*We're here for you every step of the way. Whether it's to answer a question, or help you plan your marketing efforts, feel free to reach out to our team at [ClientSupport@cusolutionsgroup.com](mailto:ClientSupport@cusolutionsgroup.com).*

THANK  
YOU



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Credit Union®  
rewards