

## TURBOTAX® FOR ONLINE BANKING FACT SHEET

TurboTax® for Online Banking is an enhanced version of TurboTax Online, fully integrated within a financial institution's Internet banking platform. Users seamlessly access TurboTax Online by signing into Internet banking to pre-populate their tax forms with tax data to quickly and easily prepare, plan and file tax returns within one online session; no additional log-in required. TurboTax Online is then launched within the Internet banking session.

Endorsed by the American Bankers Association, TurboTax for Online Banking can be integrated with any financial institution's online banking system — even those that don't use Intuit Financial Services' Internet banking platform.

### Financial Institution Benefits

- A greater share of tax refund deposits for your bank or credit union.
  - › 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/members.
- Increases use of Internet Banking.

### 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/members their refund in the fastest way possible.
- Save money.
  - › Your customers/members can complete their simple federal return for free or receive a 15 percent discount on TurboTax Online paid federal editions.

### Awards

- › Finovate Best of Show, 2009
- › Forrester Research Best Practice in Online Banking, 2009
- › Celent Model Bank award winner for Star One Credit Union's implementation of TurboTax for Online Banking, 2010

### Differentiators

**LaunchSmart** — A key differentiator amongst competitor platforms, LaunchSmart is offered at no cost to financial institutions as part of TurboTax for Online Banking. It provides training materials along with customizable staff education and end user marketing materials from a central Web site. This helps financial institutions prepare staff for TurboTax for Online Banking and drive adoption and active use amongst its customers/members.

Endorsed by the American Bankers Association.

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