

# FinanceWorks™ v2.2 powered by Quicken®

FinanceWorks™ powered by Quicken®, is the #1 online financial management solution delivered through banks and credit unions. FinanceWorks combines the best of Quicken with the convenience of online banking to transform your website into a financial management hub for your customers or members.

FinanceWorks helps drive acquisition and retention for your institution by addressing consumers' most pressing financial needs and empowering them to manage all their financial accounts in one place, with one password, so they can gain control over their spending and save more.



FinanceWorks automatically categorizes transactions so users can see where they spend their money and find ways to save.

Helps users get organized for taxes by automatically tracking tax deductible expenses.



Named "Best in Class" by Javelin Strategy and Research, June 2009.

Simplify tax time for the 40% of small businesses that co-mingle their personal and business transactions into one retail account. Users can track business income and expenses separately from personal transactions and generate a Income and Expense report.

Helps consumers achieve their budget goals with ease.



Positions you as a financial hub by allowing users to view accounts from over 16,000 financial institutions.

Alerts and reminders help users pay bills on time and get timely updates about their accounts.



Provides direct link into your bill pay solution.

Our customers' feedback on FinanceWorks has been overwhelmingly positive. Given the desire of Americans to get better control on their finances during tough economic times, we believe this new capability helps drive even greater customer loyalty for BancorpSouth because it helps customers solve important financial tasks easily and all in one place.

Michael Lindsey, Senior Vice President, BancorpSouth

Intuit Financial Services helps financial institutions optimize their profitability by continuously innovating how consumers and businesses manage their money online. The company's accelerating portfolio of on-demand software solutions and growth consulting services are based on three decades of deep customer insights inspired by Intuit innovation that results in sustained active use of the online channel.

For more information, visit [ifs.intuit.com](http://ifs.intuit.com)

# Benefits

## With FinanceWorks, You Can:

- Capture and retain your most profitable customers and members—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% of end users surveyed said they would recommend their financial institution.

“You can balance your check book so easy this way and then see what you really have left over instead of the balance that you see in your account.”

– FinanceWorks User, Ellen, Sacramento, CA

“WOW – this is so user friendly. It’s much easier to categorize expenses, quickly review where our money is going and how much we save each month. I actually enjoy doing our monthly budget now.”

– FinanceWorks User – Jackson, MS

## With FinanceWorks, Consumers Can:

- 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.

“Having the Bill Reminders is a big help. I can see each day what bill is due and what’s coming up so I can budget accordingly. No more digging for the last bill statement!”

– FinanceWorks User, Picayune, MS

“I have used many finance budget tools over the years and this one by far is the easiest and the most helpful to me.”

– FinanceWorks User, Tupelo, MS.

“I am simply amazed. I love this FinanceWorks already. It is so easy to work with. I can budget so much easier with this chart and graph, it shows exactly where my money is being spent with little or no work from me. AWESOME!”

– FinanceWorks User, Caledonia, MS

## Solutions & Services

### Consumer Solutions

Customer Support  
Internet Banking  
Marketing  
Online Financial Management  
Online Services  
Paperless Imaging

### Commercial Solutions

Business Banking  
Corporate Banking

### Lender Solutions

Branch  
Contact Center  
Online

### Security Solutions

Anti-Phishing  
Authentication Fraud  
Identify Theft Resolution

### Small Business Solutions

Invoicing  
Merchant Account Services  
Online Financial Management  
Payroll

# Optimizing your success

## LaunchSmart – End-to-end Training and Marketing Support

LaunchSmart is a one-stop-shop for everything you need to drive awareness and adoption of FinanceWorks for your end user base and employees – and it’s included with your purchase of the product.

## Launch Smart will help you...

- Accelerate business results.
- Build staff awareness and excitement through on-demand training modules and support documentation.
- Drive adoption and active use by your end users.
- Market to different target segments through a variety of print and online touch points.

## Automated Implementation

Implementation has never been this easy. You can rollout FinanceWorks in as little as a day through our self-guided, online implementation tool that’s easy to use with minimal resources required.



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