



SAFE Credit Union Gains Competitive Advantage with New Online Financial Management Solution

FinanceWorks™ powered by Quicken® delights end users during beta testing.

About SAFE Credit Union (www.safecu.org)

\$1.3 billion in assets as of June 2008
Online Banking with Digital Insight since 2002
125,000 members in the Sacramento, Calif., area

Challenges/Opportunities

- Record high foreclosures and soft economy hurt lending and deposit growth.
- Limited marketing budget and resources
- Opportunity to gain competitive advantage in their market with online financial management solution that helps drive retention, loyalty and new member growth

Actions

“Working with DI has helped us deliver best of breed solutions to our members. The addition of FinanceWorks to our offering is clearly going to be a market differentiator for us.”

- Dave Pope, Senior Vice President , SAFE Credit Union

- SAFE recognized early on that FinanceWorks will be a competitive differentiator.
- SAFE asked to join the FinanceWorks beta testing process, including two weeks of pre-production testing by staff and two weeks of production testing by end users.
- SAFE joined the advisory committee for LaunchSmart, Digital Insight’s comprehensive toolkit of training and marketing materials designed to optimize clients’ success with FinanceWorks.

Outcomes

- End user study overwhelmingly confirmed that FinanceWorks:
 - Is easy to use (testers were able to perform 2,000 activities with an average of 92% success rate).
 - Will result in greater usage of SAFE’s Web site (72% of the testers said they will logon more often).
 - Will increase retention and loyalty (77% of the testers said they are more likely to recommend their financial institution*).
- SAFE members are delighted by FinanceWorks:
 - “I think this is wonderful that I can see all of my accounts in one location and help see where my money is going!!”
 - “FinanceWorks has made my life so much easier. I can save more. I can see where I’m wasting my money. I can achieve my goals.”
 - “I love being able to add these transactions in ahead of time. I was doing this before by printing out my register from Quicken and hand writing them in. Now I don’t have to do that.”

Ask

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* Intuit End User Study, August 2008, conducted over a two-week period with 264 active end users of FinanceWorks.

This testimonial represents the individual experience of this particular customer and is not necessarily a typical experience. Intuit does not guarantee that similar results will apply to all customers.