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FinanceWorks Changes the Game for Financial Institutions and Online Banking Users

New Survey Underscores Consumers' Financial Management Needs, Preferences and Most Trusted Points of Online Service

Calabasas, Calif. – Sept. 30, 2008 – Financial institutions have a new, more complete way to meet their customers' important online financial management needs with the release of FinanceWorks™ by [Digital Insight](#), a unit of Intuit Inc. (Nasdaq: INTU).

In today's tough economic times, [FinanceWorks](#) addresses the most pressing needs of consumers by helping them manage all their financial accounts in one place so they can more easily budget, gain control over their spending and save more. The online financial management solution, powered by Quicken®, makes it possible for consumers to manage accounts across more than 5,000 financial institutions and credit card sites, ensure bills are paid on time regardless of the method they use to pay them, and see where their money is going, including future transactions. All this within the financial institution's Web site.

Now available to all financial institutions, FinanceWorks fulfills a Digital Insight commitment to help redefine the relationship between financial institutions and their customers.

“Leveraging the magic of Digital Insight and Intuit to deliver FinanceWorks, we are solving the most pressing needs of consumers and placing our client financial institutions at the center of their customers' lives,” said Sasan Goodarzi, president of Digital Insight. “Nearly 80 percent of FinanceWorks users say they're more likely to recommend their bank or credit union based solely on their FinanceWorks experience. Just imagine the tremendous growth opportunities we will deliver for our clients in the future.”

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Currently more than 60 financial institutions are either live, in the implementation process, or contracted to offer FinanceWorks in the coming weeks. End user reaction so far supports the vision that FinanceWorks will make people more likely to recommend their financial institution to others. This is important since Digital Insight research shows that a quarter of all new customers have switched financial institutions based on the recommendation of a friend or family member.

“Our customers’ feedback on FinanceWorks has been overwhelmingly positive,” said Michael Lindsey, senior vice president, BancorpSouth in Tupelo, Mississippi. “Given the desire of Americans to get better control on their finances during tough economic times, we can see how this new capability could help drive even greater customer loyalty for BancorpSouth because it helps customers solve important financial tasks easily and all in one place.”

Survey Reveals Online Financial Management Preferences

Digital Insight’s 2008 Online Financial Management survey revealed that “trust and familiarity” is an important factor when people are choosing where to manage their money on the Web. Sixty-eight percent of consumers ranked their bank or credit union as the most trusted place to keep their online financial information secure, while 66 percent picked a Web site hosted by an established company as their second choice. Only one-percent said that a Web site hosted by a new, start-up company would be their most-trusted place to manage their finances online.

“People want a trusted place to view all of their accounts, make better decisions about where they spend their money, and pay their bills with peace of mind that their information is safe and secure,” said Goodarzi. “FinanceWorks enables banks and credit unions to be that place, strengthening and deepening their relationships with users.”

Other survey findings confirm that FinanceWorks helps solve consumers’ most important financial issues and bridges the gap between financial institutions’ current online offerings and what customers want to manage their finances more effectively.

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Digital Insight research shows:

- Forty percent of respondents said saving is important, but were unable to save as much as they did last year. Survey respondents also said their most pressing financial concerns are: living within their means (26 percent), and dealing with debt (21 percent). Longer-term goals, such as saving for retirement, college or a house, lag behind.
- Sixty-one percent said the most important financial management feature is the ability to manage and pay all of their bills from one place.
- Nearly all the survey respondents were customers of a financial institution that offers online banking, yet only 24 percent said their financial institution provides valuable information today. A total of 87 percent said their bank or credit union only helps them pay bills, check balances, or is just “a place that holds my money.”

Digital Insight is delivering FinanceWorks to help middle market banks and credit unions better meet the needs of consumers and compete with national banks.

“Working with Digital Insight 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,” said David Pope, senior vice president, SAFE Credit Union in North Highlands, California.

Survey Methodology

The 2008 Digital Insight Online Financial Management Survey was fielded by Decipher research in September 2008 and was based on answers from 1,100 adults.

Links:

[Main Intuit Site](http://www.intuit.com) www.intuit.com

[Digital Insight Site](http://www.digitalinsight.com) www.digitalinsight.com

[FinanceWorks](http://www.digitalinsight.com/home/solutions/consumer/pfw) <http://www.digitalinsight.com/home/solutions/consumer/pfw>

Tags:

online banking, financial management, banks, credit unions, FinanceWorks, Digital Insight, Intuit, personal finance, manage money, track spending, customer retention, customer acquisition

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About Intuit Inc.

Intuit Inc. is a leading provider of business and financial management solutions for small and mid-sized businesses; financial institutions, including banks and credit unions; consumers and accounting professionals. Its flagship products and services, including QuickBooks®, Quicken® and TurboTax® software, simplify small business management and payroll processing, personal finance, and tax preparation and filing. ProSeries® and Lacerte® are Intuit's leading tax preparation software suites for professional accountants. The company's financial institutions division, anchored by Digital Insight, provides on-demand banking services to help banks and credit unions serve businesses and consumers with innovative solutions.

Founded in 1983, Intuit had annual revenue of \$3.1 billion in its fiscal year 2008. The company has approximately 8,000 employees with major offices in the United States, Canada, the United Kingdom and other locations. More information can be found at www.intuit.com.

About Digital Insight

Digital Insight is the leading outsourced provider of online banking services to mid-market banks and credit unions in the United States. The company's extensive portfolio of on-demand applications includes consumer and business Internet banking, online lending, electronic bill payment and presentment, Web site development and hosting, marketing programs designed to help increase online banking end user growth, and more.

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