



Love My Credit Union®
rewards

Tax Services Credit Union Member Program



Our Purpose Today

- What's New
- Tax Partners Overview
- Value for Members
- Value for Credit Unions
- Marketing Materials
- Member Experience



Love My Credit Union®
rewards

TurboTax



For going on 12 years, we have been offering members a discount on the **#1 best-selling** Do-It-Yourself (DIY) online tax software. TurboTax offers a variety of options for members to complete their taxes online, from numerous DIY options to working with an expert from start to finish. In 2021, **29%** of all IRS returns were prepared with TurboTax.

TurboTax Products

- **TurboTax Free Edition – Free Fed & State**
 - For qualifying members with simple tax returns
- **TurboTax Deluxe**
 - For homeowners and others who are interested in maximizing their deductions and credits
- **TurboTax Premier**
 - Designed for all levels of investing and investment types, from simple stocks to complex rental income
- **TurboTax Self-Employed**
 - Specifically designed to address the needs of the growing self-employed segment



Welcome H&R Block



Now, we are very excited to announce H&R Block has joined the Love My Credit Union Rewards program, expanding our tax services offering and giving members more choices and solutions to file their taxes.

Why add H&R Block? H&R Block believes the best solutions blend digital capabilities with human expertise and care. They were founded in 1955 and now have over 10,000 retail tax offices staffed by tax more than 70,000 professionals worldwide.

This past tax season (January – July 2021) ~**12M** people used H&R Block for **in-office** tax preparation services. Our partnership with H&R Block provides credit union members another option to save on their tax preparation and filing.





Love My
Credit Union®
rewards

VALUE FOR
MEMBERS

A Tax Solution for Every Member



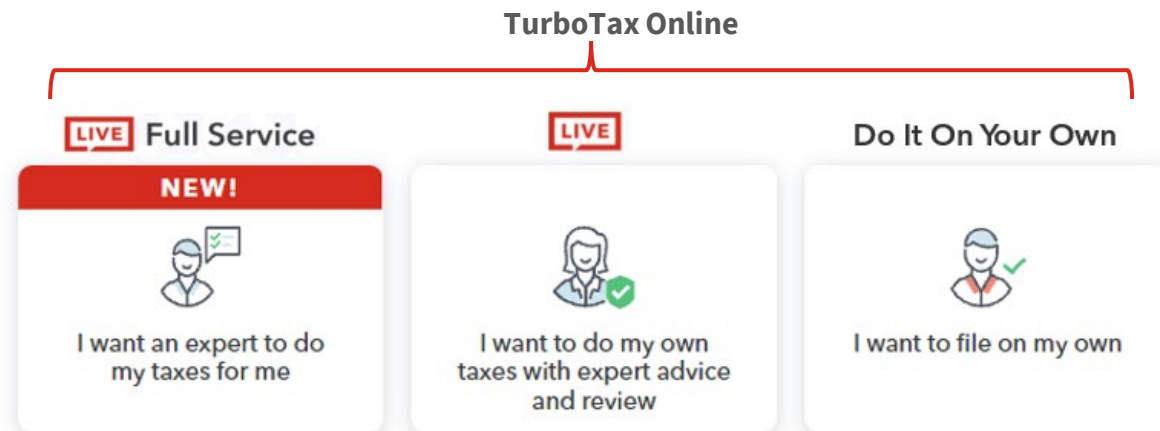
With the addition of H&R Block to the LMCUR program, members can now choose to do their taxes on their own online or have a tax expert do their taxes for them.

TurboTax Online

- **Do it Yourself** – Members answer simple questions and are guided step by step to get their maximum refund.
- **Live** – Members get unlimited expert advice and answers right on their screen and a final review before they file.
- **Live Full Service** – Members can hand their taxes off to a dedicated tax expert to handle everything, from start to finish.

H&R Block In-office

- **Have a Tax Pro Do All The Work**– H&R Block **in-office** tax professionals are here to help members with what they need. They'll do their taxes and give members professional guidance and a relationship they can rely on year after year.



Member Offers



More ways to file. More ways to save.

- **TurboTax** offers members **savings of up to \$15** on federal online tax preparation products, online Do-It-Yourself, LIVE and LIVE Full Service.
- **H&R Block** will offer credit union members new to H&R Block **savings of \$25 off in-office** tax preparation services from a tax professional. Returning H&R Block customers are eligible to receive the **Tax Identity Shield** for **FREE, a \$35 value**.
 - A new customer is defined as **not having** used H&R Block the previous tax season to complete and file their taxes.
 - A returning customer is defined as **having** used H&R Block the previous tax season to complete and file their taxes.
 - **Tax Identity Shield**
 - Dark Web Identity Watch – We’ll continuously look out for your personal information where criminals buy and sell personal data.
 - SSN Alerts – We’ll notify you of any names or addresses associated with your Social Security number, or if your SSN is found on any tax return filed in our system.
 - Tax Return Notifications – If someone attempts to e-file a tax return using your info in our system, we’ll keep you updated.
 - IRS Protections – If we discover indicators of identity theft, we’ll help you apply for proactive IRS protections like an IRS IP PIN.
 - Tax Identity Restoration Assistance – If you become a tax fraud victim, we offer assistance from a specially-trained agent to help recover your refund as quickly as possible



Love My
Credit Union®
rewards

VALUE FOR
CREDIT UNIONS

Value for Credit Unions



- **Strengthen member relationships by providing members with savings and expert tax resources**
- **Grow investments and deposits with member tax refunds**
- **Improve wallet share by leveraging tax refunds to promote core products and service**
- **H&R Block office locations within 5 miles of your members**
- **TurboTax co-branded microsite prominently displaying your credit union logo and name**
- **TurboTax employee discount**



Marketing Made Simple



New Tax Services marketing materials will feature both TurboTax and H&R Block. All marketing materials are FREE and available in our Partner Center.

Banners/Digital Ads/Social Media Ads

- TurboTax and H&R Block will be included in the same messaging
- CTA will direct members to the LMCUR Tax Services landing page
- Member's credit union affiliation will be tracked by the banner coding

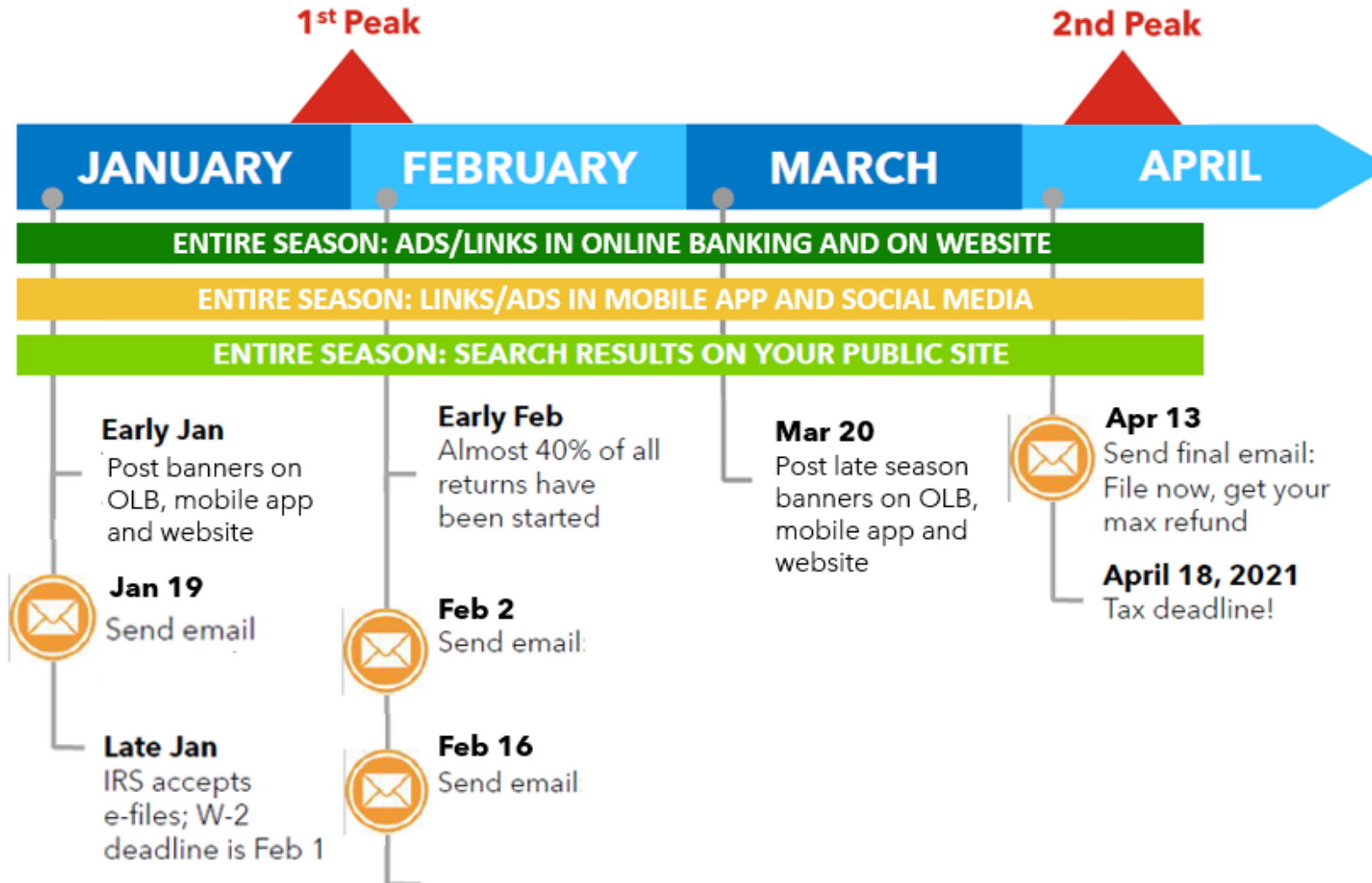
• Emails

- Email templates will include both TurboTax and H&R Block
- The CTA in the TurboTax section will take members to your credit union's microsite
- The CTA in the H&R Block section will take members to the LMCUR Tax Services landing page

• Newsletter Messaging

- TurboTax and H&R Block will be represented in the newsletter messaging with the associated member savings
- Members will be directed to taxservices.lovemycreditunion.org to select TurboTax or H&R Block

Recommended Marketing





Love My
Credit Union®
rewards

MEMBER
EXPERIENCE

Member Journey



A new LMCUR Tax Services landing page and new marketing materials will be created that will feature both the TurboTax and H&R Block offers

Tax Services Landing Page

- TurboTax Section
 - The TurboTax section will include a brief overview of the TurboTax online products and the member discount. It will also include a CTA which will direct members to your credit union's microsite.
- The H&R Block Section
 - The H&R Block section will include a “Get Coupon” button and link to “Make An Appointment”
 - **Get Coupon**- When members click on the “Get Coupon” button they will receive a coupon featuring two codes, one for a NEW customer and one for a RETURNING customer. Members will have the option to print or save the coupon. The coupon is valid until October 15, 2022. Members must present the coupon to their H&R Block tax pro to receive the credit union member savings.
 - **Make An Appointment** – When members click on the “Make An Appointment” link they will be taken to the H&R Block appointment maker where they will be asked to input their location. They will then be presented with H&R Block offices near them where they can select a day and time to meet with a tax professional.

Next Steps!

- ❑ Review the Marketing Plan and calendar that is posted in the Partner Center
- ❑ Develop a plan to market the tax services program to your members
- ❑ Access the marketing materials in the Partner Center
- ❑ Share the **TurboTax Employee Discount** flyer with your HR department.
- ❑ **Upload any new co-branding** for your TurboTax microsite on your dashboard in the Partner Center
 - 90 x 20 pixels Credit Union logo
 - 120 x 90 pixels Credit Union Logo
 - 120 x 90 pixels Cross Sell Banner



Add key dates to your marketing calendar

Thank you for your time

We're here for you every step of the way. If you have any questions or need assistance, feel free to reach out to our Client Services team at ClientSupport@CUSolutionsGroup.com.