



Case Study



Banking Services

How the nation's top self-service tax preparer goes from once a year experience to year-round delight

CHALLENGE

In the hyper-competitive tax preparation market, filers want their refunds faster than ever. How do you turn a once a year brand into something they engage with year-round?

SOLUTION

- TurboTax debit card option integrated right into the tax preparation software so customers' refunds arrive faster than a check
- Refund advance loans for qualified tax filers to access funds before their tax refund has been issued
- Full array of banking services they can use all year long

CONSUMER BENEFITS

Transfer and manage their Money all in one app

It's quick and easy for tax filers to open an account online to receive their tax refund

Get paid up to 2 days early and four days before federal benefits when they set up direct deposit

Withdraw cash through our network of thousands of no-fee ATMs

At retailers nationwide, seamlessly deposit cash to their bank account with their card

Send and request money to friends and family with their balance

Hear back in seconds and nearly everyone qualifies with successful identity verification



Digital Money Movement



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BUSINESS BENEFITS

Enable self-directed customer tools and service

Issue virtual and physical cards that can be used anywhere Visa debit is accepted

Drive customer loyalty with an opportunity for an earlier payday not offered by the big banks

Offer cash access using our nationwide ATM networks and ATM locator API

Enable cash deposits at retailers nationwide with more physical locations and better hours than any bank

APIs enabling digital money movement to and from multiple accounts

Comprehensive program management including identity verification, risk and customer service