

FinanceWorks™

Engage customers with a best-in-class personal financial management solution that integrates account data from more than 20,000 financial institutions and turns your site into a go-to financial resource.



Leverage FinanceWorks and our self-serve, cross-sell solution to help your financial institution:

- Increase end-user profitability and engagement.
- Cross-sell more effectively and efficiently.
- Reach your most profitable end users based on intelligence collected via account aggregation.

Financial Institution Benefits

- Increase customer profitability and engagement.
- Cross-sell more effectively and efficiently based on competitive intelligence from account aggregation. Access the Cross-sell tool at *Admin Platform > Administration > FinanceWorks*

End-user Benefits

- Access your total financial picture in one place and view spending behaviors to help with important financial decision-making.
- Gain immediate visibility to valuable insights.
- Get on track with budgets and know exactly where your money is going.

Features

- Transactions are automatically categorized and displayed graphically.
- Aggregate outside accounts, choosing from over 20,000 financial institutions.
- View spending, income and savings activity.
- Explore specific spending categories to view transaction details.
- Set up budgets to track spending behavior.

Drive Adoption and Active Use

Digital Insight has no-cost, self-serve marketing campaigns and tools to help you ensure the highest adoption and usage rates for your new solution. Learn more by visiting [Admin Platform > Marketing > FinanceWorks](#).

- FinanceWorks delivers end users the simple money-management tools they need to take charge of their financial lives.

- FinanceWorks consumers access their financial information 51 percent more frequently than online non-FinanceWorks, providing an additional opportunity to cross-sell.¹
- FinanceWorks consumers conduct 26 percent more monthly debit card purchases than Online, non-FinanceWorks consumers.²
- FinanceWorks consumers own 8 percent more accounts (loan & deposit products) than Online non-FinanceWorks consumers.¹

¹ Internal study of 60 Digital Insight FI customers, July 2009 through March 2014; claim based on comparison to Digital Insight online non-FinanceWorks consumers.

² Internal study of 42 Digital Insight FI customers, July 2009 through March 2014; claim based on comparison to Digital Insight online non-FinanceWorks consumers.

Banks and credit unions turn to Digital Insight for innovative online and mobile banking that drives growth. For nearly 20 years, our leading solutions have helped financial institutions engage more meaningfully and more profitably.

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