

WHEN IT COMES TO DRIVING SALES of the most popular personal finance software product on the market, not just any product premium will do. Trying to keep users coming back for updates is a challenge, especially in an online world populated with both paid and free products trying to elbow you aside. So what are the sales and marketing staff to do?



Intuit, creator of Quicken, wanted to accomplish a two-fold mission: boost sales of its flagship product

through innovative product premiums while at the same time increasing the nation's terrifyingly low rate of financial literacy. There aren't many personal finance products out there that can do both, but the Intuit direct marketing department hit on a winner when it decided to team up with Precision Information (PI) publisher of the Educated Investor® family of products.

For more than 5 years, PI's Educated Investor guides have been one of the most popular product premiums paired with Quicken, helping Intuit drive in more than 300,000 customers and over \$10 million in revenue from its direct marketing efforts. Intuit has used a wide array of PI's Educated Investor guides as product premiums, including **The Educated Investor Guide to Personal Finance™**, **The Educated Investor Guide to Investing™**, **The Educated Investor Guide to Financial Planning™**, and **The Educated Investor WealthBuilder™**

Starting in 2001, Denise LaBuda and Becke Broadbent of Intuit began working with the Educated Investor team to develop a compelling product premium that would not only drive sales of Quicken but also provide some basic financial education that users desired.

The timing could not have been better. With a volatile stock market and shaky economy, surveys show that the majority of Americans simply do not feel confident about their ability to make sound financial decisions. As a result roughly 84% of consumers say that they want financial service firms (like Intuit) not only to sell financial products, but also to take an active role in helping educate them about financial topics.*



FREE!

Take control of your investments with The Educated Investor Guide to Personal Finance™

EDUCATED INVESTOR™

Fine-tune your financial know-how with **The Educated Investor Guide to Personal Finance™ 2005**. This powerful interactive software puts a wealth of expert guidance at your fingertips - to help you make better-informed decisions about everything from personal finance and financial planning to investment strategies and more.

The Guide's interactive articles, tutorials, and quiz questions, and jargon-free Glossary of important terms make it a great resource for beginning and seasoned investors alike. Discover:

- How to plan and implement your financial goals (or adjust your investment strategy to best meet your goals, etc.)
- Investor insights for optimizing credit, home ownership, insurance - and more.
- How to choose the right investment strategies for your unique financial situation.
- Important retirement investment strategies and estate planning options you need to know about.

The Educated Investor Guide to Personal Finance™ 2005 is the perfect resource for anyone who wants to make smarter investment decisions - and it's yours FREE just for trying new Quicken 2005 Premier. Limited-time offer - order now.

A \$34.95 Value - Yours FREE with Quicken 2005 Premier!

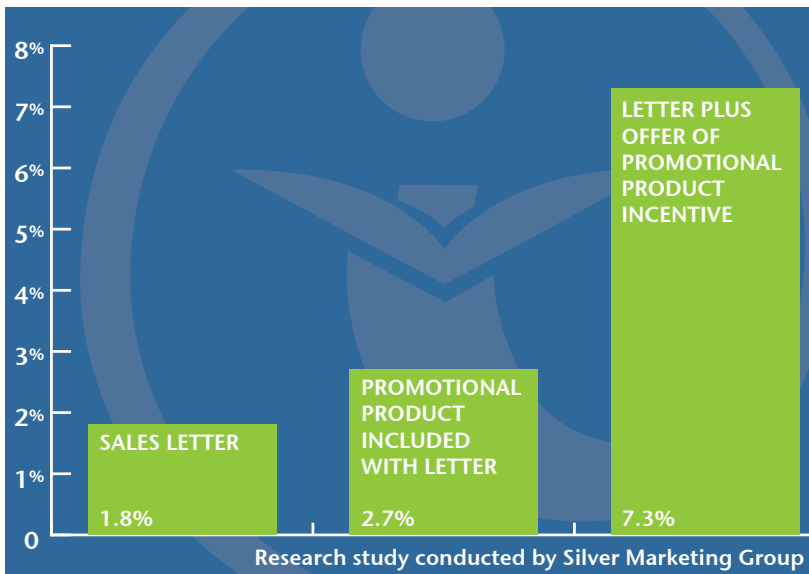
See other side for another **FREE Gift!**

The Educated Investor Guide to Personal Finance™ promotional piece included with Quicken Premier.

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*Securities Industry Association Annual Investor Survey

Originally, Intuit considered using the Educated Investor flagship product, the Encyclopedia of Personal Finance,™ as a premium. Yet, Intuit's direct marketing team quickly realized that PI's Educated Investor guide platform offered them a unique opportunity – the ability to quickly create a much more targeted approach.



Studies have shown that an effective product premium can often lift response rates by as much as 2–3 times the same offer without the free premium.

“We were looking for a product premium that would enhance our direct marketing efforts and provide some educational value on the ‘hot topics’ of interest to our customers, and the Educated Investor guides did both,” LaBuda says. “We liked how the Educated Investor guides presented concepts in short, easy-to-understand lessons with quizzes at the end so investors could go at their own pace to find the information they need.”

As an added bonus, the Educated Investor guides are a dual platform program, meaning that Intuit could offer a single product premium to support both its Macintosh and PC customers. “There wasn’t anything else out there like the Educated Investor guides, and PI worked closely with us to deliver a product in the format we needed.” LaBuda adds.

The concept of providing value-added 3rd party product premiums (a FREE gift) to drive response rates is a time-tested direct marketing

technique that can lift direct response rates by 2 to 3 times as much as the same offer without a FREE premium. Yet, as the nation’s leading publisher of personal finance and tax tools, Intuit holds its partners to an even higher standard and will terminate a partner if results or product quality aren’t up to par.

With over 5 years and more than \$10 million in revenue thus far, 300,000+ new Quicken customers help serve as tribute to the ability of the Educated Investor’s team to create a reliable, easy to use, and robust dual-platform product line that generates results.

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