

TURN KEY



Best Practices In Action

Summer 2016



Quicken™ Premier Program Allows Credit Unions To Improve Members' Personal Finance Practices

Free, Unlimited-License CDs Bolster Credit Unions' Financial Counseling Efforts

Taking control of your personal finances is a little like starting a diet. A good place to begin a diet is by measuring your daily caloric intake, just like recording your daily income and expenses is the perfect first step in controlling your own finances.

The Credit Union Foundation MDIDC has a perfect tool that your members can use to start their path to financial independence.

The Foundation will make available, at no charge and while supplies last, copies of open-license Quicken™ Premier, the leading personal finance software used by countless well-informed users.

These Quicken™ CDs can be used to help credit unions counsel members who are in need of restoring their credit ratings, are just getting started in the working world, or who just want a better way to monitor their savings and spending.



The more your members use this powerful tool, the more useful it becomes.

By using Quicken™ Premier, your members can:

- See where their money goes
- Stay on top of their monthly bills
- Track spending goals to save money

The Foundation will provide one to three copies of the Quicken™ CDs per credit union/branch (while supplies last).

Member Service Representatives may then install the program on their members' laptops or create a "lending library" and allow members to take the CDs home to install on their desktop computers.

Copies of the "Quick-Start" instructions are included with every CD requested from the Foundation.

If your credit union provides financial counseling/education, or you are in need of a powerful tool to help you assist your members, this free offer can be an ideal addition to your member service.

Funding for this Quicken™ program comes from charitable support provided to the Foundation, by its generous donors.

See reverse for program details and how to request your credit union's copy of this open-license Quicken Premier CD.

Quicken™ Premier Helps Members Take Control Of Their Finances

The CDs are licensed to allow unlimited installs on your members' PCs as long as they are being used in conjunction with your financial education/counseling efforts.

Q&A

Quicken™ Offer



What is the purpose of the Foundation's Quicken™ Premier Program?

Credit unions with strong financial counseling programs know that members they help to recover from financial missteps can become dedicated life-long members and strong advocates for the Credit Union Movement. Helping new members to build their credit, and counseling members to help them repair financial issues is one of the ways that credit unions can distinguish themselves from for-profit banking institutions. Having the right tools to guide members as they focus on their personal finances is important, and Quicken Premier is just the tool for the job.

How does Quicken™ Premier help members take control of their finances?

Once loaded on the member's computer, Quicken™ provides them the ability to set up a budget, review budget progress at any time, register all income and expenses, stay on top of bills, organize family finances, insert downloaded transactions from credit unions offering this service, and manage investments. By allowing users to quickly review their personal finances, produce reports, and monitor income and expenses, members are better able to grasp their financial condition and work toward measurable goals.

What credit unions are eligible?

Every Maryland or District of Columbia-based credit union is eligible to receive copies of the Quicken™ Premier software for their use in counseling members or bolstering their financial education offerings.

How much do I have to invest to get these CDs?

The Credit Union Foundation MD/DC has purchased these software CDs for you and is making them available at no charge to eligible credit unions for their use in serving their members. Supplies, however, are limited.

Are there any technical details to the Quicken™ CD Offer?

The Quicken™ CDs are for use in PC desktops and laptops. They are not compatible with the Apple Macintosh platform. Every CD request is shipped with "Getting Started" documentation that helps users become familiar with managing their finances in Quicken™. Additional support is provided online.

How is this program funded?

Funding for financial literacy programs and grants come from various sources including endowment earnings, support from Foundation donors, the Foundation's annual "Friend-Raising" events, and the Financial Literacy Month Campaigns.

How do I request copies of the Quicken™ CDs for my credit union?

Visit the Foundation's Personal Finance Software site and complete the online request form at cufound.org/quicken to request copies of the software for your credit union.