

Our strategy: To be an AI-driven expert platform

For over a decade, Intuit has been innovating with data and AI to help consumers and small businesses make smart financial decisions, with less work and complete confidence, enabling them to put more money in their pockets.

Six years ago, we declared our strategy to be an AI-driven expert platform: an open, trusted, and easy-to-build-on platform from which we and our partners solve the most pressing customer problems and deliver awesome experiences.

We're transforming from a tax and accounting platform, where consumers and small businesses have to do the work, to a global financial technology platform, where we do the hard work for them to fuel their success.

USING DATA TO POWER PROSPERITY

Foundational to our platform is the data our customers have entrusted with us to create highly personalized AI-driven experiences by harnessing information across our product ecosystem:

- | **95PB** of data
- | **580K** customer/financial attributes per small business
- | **60K** tax/financial attributes per consumer
- | **25B** transactions imported from financial institutions annually

EARLY INVESTMENTS IN DATA AND AI/GENERATIVE AI

Today, we use a combination of machine learning, knowledge engineering, natural language processing, natural language understanding, and generative AI (GenAI) to deliver personalized experiences for approximately 100 million customers with Intuit TurboTax, Credit Karma, QuickBooks, and Mailchimp.

Because we understand where the customer is on their financial journey, we can anticipate or predict what's coming to provide personalized recommendations or insights. The results are clear in the numbers:

- | **60B** machine learning predictions per day
- | **4M** models running in production per day
- | **1,072** AI, machine learning, and data science US patent assets

CATALYZING AI/GENAI INNOVATION WITH SPEED, AT SCALE

In June 2023, we introduced **GenOS**, a proprietary GenAI operating system to empower Intuit technologists to design, build, and deploy breakthrough AI and GenAI-driven products with unparalleled speed. Updated in September 2024, GenOS now includes:

- | **GenStudio:** A sandbox for developers to experiment with LLMs via access to a catalog of best-in-class commercial, open source, and proprietary LLMs.
- | **GenRuntime:** An intelligent layer that accesses the right data and capabilities with sophisticated components: GenOrchestrator (planner, executor, memory and knowledge retrieval), agents, tools to ground LLMs in Intuit domain knowledge, and capabilities to enable agentic workflows.
- | **GenUX:** A user experience (UX) framework with a continuously updated library of UX components, widgets, and patterns that designers and front-end developers can use to build consistent and intuitive experiences.
- | **Large language models:** Custom-trained financial LLMs fine-tuned to solve tax, accounting, personal finance, and marketing challenges.
- | **AI Workbench:** A dedicated environment for end-to-end application development.
- | **GenSRF** (security, risk and fraud): Additional built-in guardrails for responsible development, an extensible and configurable framework with embedded safety, privacy, and security controls.

Intuit Assist

EXTENDING OUR AI AND GENAI LEADERSHIP WITH INTUIT ASSIST

Introduced in September 2023, Intuit Assist—our GenAI-powered assistant—provides personalized, intelligent recommendations that help customers make smart financial decisions with less work and complete confidence. Built with GenOS, Intuit Assist is embedded across our platform and products—including TurboTax, Credit Karma, QuickBooks, and Mailchimp—putting next-generation AI in the hands of consumers and small and mid-market businesses.