



United Methodist Foundation of Michigan

Investing. Serving. Transforming.

Investing in Financial Wisdom: Why Intuit's Literacy Mission Matters to Faith-Based Investors

Socially responsible investing is a popular trend, especially among younger generations. However, value-driven investing has been a long-term cornerstone of the Foundation. We hold a theological and strategic commitment to aligning your portfolio holdings with our shared, sustainable values. This pairing is one reason why we are proud to include Intuit in the Stock Fund. They are a company actively empowering the next generation through financial education.

Intuit's 2030 Goal

Intuit has long been known for tools that help people navigate taxes, small business finances, and credit. Now, the global financial technology company is channeling that same expertise toward an ambitious goal: helping 50 million students become financially literate, capable, and confident by the year 2030.

It is a timely mission. Today's students are entering adulthood without essential knowledge about budgeting, saving, or managing debt. However, they often are expected to make major financial decisions that will shape their futures. A recent national survey revealed that 85% of U.S. high school students want to learn about personal finance, and 95% of those who receive financial education find it helpful. Intuit is responding to that need with action.

A Curriculum for the Real World

The centerpiece of this effort is Intuit for Education, a free, flexible program designed for U.S. high school educators. It includes more than 150 hours of customizable curriculum and blends personal finance with entrepreneurial learning. Interactive lessons use real-world tools like TurboTax, QuickBooks, Credit Karma, and Mailchimp so financial concepts are tangible and relevant.

To support educators, Intuit also offers free professional development through live and on-demand training, podcasts, and webinars. The goal is not just to check a box for financial education but to equip educators to teach with confidence and clarity.

National Momentum: The Hour of Finance Challenge

Last April, Intuit launched the Hour of Finance Challenge to encourage all schools to dedicate at least one hour during Financial Literacy Month to these critical lessons. Plug-and-play lesson plans and an engaging online game brought subjects like taxes, credit, and investing to life. "Without personal finance knowledge, students struggle to make informed financial decisions, jeopardizing their long-term financial success after graduating," said David Zasada, Vice President of Education and Corporate Responsibility at Intuit. To add incentive, schools compete for prizes up to \$100,000, depending on size.

Why It Matters to Faith-Based Investors

Financial literacy is about more than balancing a checkbook – it's about equity, opportunity, and dignity. For those who invest with purpose, initiatives like this one are powerful examples of business aligning with the common good.

As Rev. Dr. David S. Bell, President and Executive Director of the United Methodist Foundation of Michigan, reflects, "Intuit's commitment to financial education exemplifies the kind of value-aligned leadership that we look for in our investments. At the Foundation, we're investing to make a faithful impact and secure competitive returns. Programs like Intuit for Education offer practical tools that prepare the next generation for financial well-being and lifelong engagement."

A Return That Resonates

By teaching students how to manage money before they are expected to make life-changing financial choices, Intuit is meeting a real societal need. They are demonstrating the role that the private sector can play in shaping a more informed, confident, and equitable future. For faith-based investors, it's a reminder: your portfolio can reflect more than performance. It can reflect hope, wisdom, and the kind of change that endures.

October, 2025