

Trustworthy.

The Family Operating System®

Meet Trustworthy — The Family Operating System®

The online service that helps advisors organize, protect and optimize sensitive client information.

The screenshot shows the Trustworthy web interface for the McKinley Family. The top navigation bar includes the Trustworthy logo, the family name, and user profile icons. A left sidebar lists various categories: Dashboard, Family IDs, Money, Property, Passwords, Insurance, Taxes, Legal, Business, and Emergency Planning. The main content area features a personalized greeting, "Good morning, Jackie," and a "Total items" count of 324. Below this, there are sections for "For you" with tasks like "Add passport" and "Add lender," and "Progress" with progress bars for Family IDs (31 items), Property (12 items), Money (25 items), and Passwords (8 items). A right sidebar contains "Reminders" (e.g., "Update warranty" due in 10 days) and "Collaborators." A bottom section highlights a "Sponsored Plan" by Sterling Advisors.

The screenshot shows the Trustworthy mobile app interface. The top status bar displays the time as 9:41 and signal strength. The main screen is titled "Browse" and features a "Contacts" button. A list of categories is shown, each with a "14 recommended items" count and a right-pointing arrow: Family IDs, Money, Property, Passwords, Insurance, Taxes, Legal, and Business. At the bottom, there is a navigation bar with icons for "For you," "Dashboard," "Scan," "Browse," and "Account."

Offer an organized overview of important client information.



Family ID



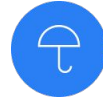
Money



Property



Passwords



Insurance



Taxes



Legal



Emergency
Planning



Contacts



Business

An ecosystem where everyone benefits.

Professional firms and financial institutions need to be where their clients are — online. Modern households expect comprehensive offerings to meet all their needs.

Give your clients Trustworthy, a custom-fit platform that grows with families as they navigate the road of life.



Built for Wealth Advisors & Family Offices.

The image displays two overlapping windows. On the left is a Microsoft Excel spreadsheet titled "McKinley Recovery Manual - Saved". The spreadsheet has a table with the following data:

Bank	Name	Account #
Bank	Bank of America, Business & Personal	123456789
Bank	Bank of America, Business & Personal	987654321
Bank	Bank of America, Business & Personal	112233445
Bank	Bank of America, Business & Personal	556677889
Bank	Bank of America, Business & Personal	990011223
Bank	Bank of America, Business & Personal	445566778
Bank	Bank of America, Business & Personal	889900112
Bank	Bank of America, Business & Personal	334455667
Bank	Bank of America, Business & Personal	778899001
Bank	Bank of America, Business & Personal	223344556

On the right is the Trustworthy dashboard for the "McKinley Family". The dashboard features a sidebar with navigation options: Dashboard, Family IDs, Money, Property, Passwords, Insurance, Taxes, Legal, Business, and Emergency Planning. The main content area displays a personalized greeting "Good morning, Jackie." and a "For you" section with three tasks: "Add passport" (Jackie's Family ID), "Add lender" (Loan for Winter Cabin), and "Add account number" (Jackie's Savings Account). Below this is a "Progress" section with four categories: Family IDs (31 recommended items), Property (12 recommended items), Money (25 recommended items), and Passwords (8 recommended items). The right sidebar shows "Total items" (324), "Reminders" (Update warranty, Renew Drivers License), "Collaborators" (3 users), and "Resources" (Chat with an Expert, See what's new). At the bottom right, there is a "Sponsored Plan" for Sterling Advisors.

Professional Firms

- Wealth Advisors
- Family Offices
- Tax Advisors & CPAs
- Law Firms

Trustworthy. Sterling Advisors 👤

SA Sterling Advisors

Client Dashboard

Manage sponsored accounts, invite new clients, purchase seats. Add client +

Clients (82) 20 clients available ⓘ 🔍 Search...

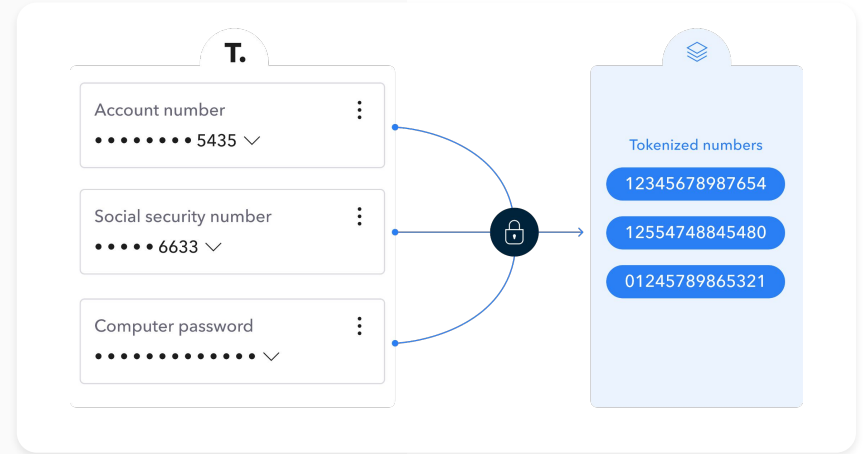
CLIENT NAME	ADVISOR	CATEGORY ACCESS	STATUS
Jackie McKinley jackie.f.mckinley@gmail.com	Angel Dias	Family IDs, Money	In progress
Allison Curtis allison.curtis@gmail.com	Lauren Howard Pending	None	In progress
Abram Baptista abram.baptista@gmail.com	Emery Kenter	Money, Taxes	Invited Yesterday
Jakob Bergson jakob.bergson@gmail.com	Kadin Levin	Insurance	Invited 2d ago
Kianna Calzoni kianna.calzoni@gmail.com	Ashlynn Levin	Property, Money, +3	Invited 4d ago
James Culhane james@gmail.com	Giana Bergson	Family IDs, Insurance	Active
Alfonso Lipshutz lipshutz.alfonso@gmail.com	Nolan Korsgaard	Insurance, Taxes	Active

- Open client account
- Edit client details
- Edit category access
- Change advisor
- Send invitation
- Remove client

Security is foundational to every decision we make.

Every decision in creating Trustworthy begins with the safety and privacy of our clients' data in mind.

- Tokenized assets
- Redacted fields
- Default two-factor authentication
- Biometric authentication
- Hardware keys available
- 256-bit encryption
- Third-party security certification



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