Trustworthy.

The Family Operating System®

Meet Trustworthy —
The Family Operating System®

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

Offer an organized overview of important client information.

Family ID	Money	Property	Passwords	Insurance
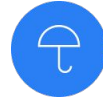
Taxes	Legal	Emergency Planning	Contacts	Business

T.

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.

Trustworthy.

You
Dad
Husband
Emergency Contact
Real Estate Agent
Nanny
Lawyer
Wealth Advisor

T.

Built for Wealth Advisors & Family Offices.

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 +

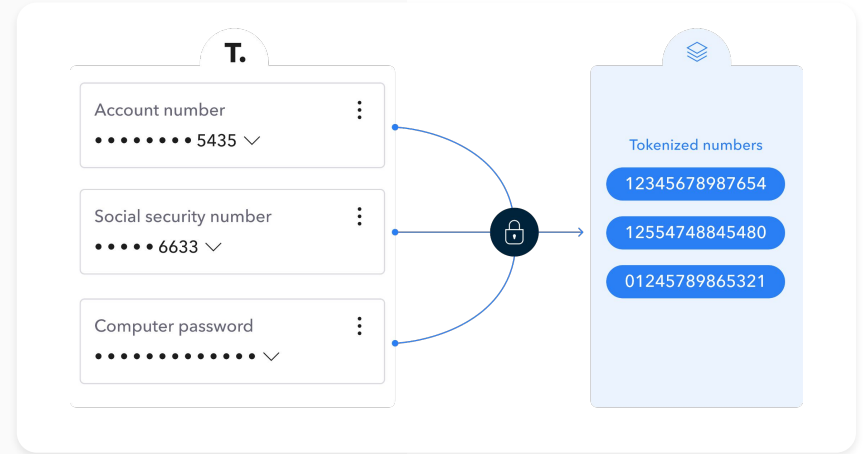### Clients (82)   20 clients available ⓘ

Search...

CLIENT NAME ⌄	ADVISOR ⌄	CATEGORY ACCESS ⌄	STATUS ⌄	
Jackie McKinley jackie.f.mckinley@gmail.com	Angel Dias	Family IDs, Money	● In progress	Open client account
Allison Curtis allison.curtis@gmail.com	Lauren Howard Pending	None	● In progress	Edit client details
Abram Baptista abram.aptista@gmail.com	Emery Kenter	Money, Taxes	● Invited Yestereday	Edit category access
Jakob Bergson jakob.bergson@gmail.com	Kadin Levin	Insurance	● Invited 2d ago	Change advisor
Kianna Calzoni kianna.calzoni@gmail.com	Ashlynn Levin	Property, Money, +3	● Invited 4d ago	Send invitation Remove client
James Culhane james@gmail.com	Giana Bergson	Family IDs, Insurance	● Active	
Alfonso Lipshutz lipshutz.alfonso@gmail.com	Nolan Korsgaard	Insurance, Taxes	● Active	

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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