



Trustworthy.

Feature Overview

Trustworthy helps wealth advisors, financial planners, and family offices deliver a secure, collaborative, and integrated portal experience for clients and their important information.

Categories

Partner Portal

Enhance the value you provide with a secure, client-first, digital experience.

- Co-branded client experience
- Multi-advisor and multi-household access
- Preconfigured accounts
- Custom implementation
- Dedicated partner support

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
JM Jackie McKinley jackie.f.mckinley@gmail.com	Angel Dias	Family IDs, Money	In progress
AC Allison Curtis allison.curtis@gmail.com	LH Lauren Howard Pending	None	In progress
AB Abram Baptista abram.aptista@gmail.com	Emery Kenter	Money, Taxes	Invited Yesterday
JB Jakob Bergson jakob.bergson@gmail.com	Kadin Levin	Insurance	Invited 2d ago
KC 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

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

Family IDs

Keep up-to-date digital copies of client IDs. Access and securely share their important documents as needed.

- Driver's Licenses
- Passports
- Social Security Cards
- Vaccine Cards
- Birth Certificates
- Membership Cards
- Travel Rewards Programs
- and more...

The screenshot shows a web application interface for 'Trustworthy. McKinley Family'. The top navigation bar includes the logo, the name 'McKinley Family', and user profile icons. A left sidebar contains a menu with items: Dashboard, Family IDs (selected), Money, Property, Passwords, Insurance, Taxes, Legal, Business, and Emergency Planning. The main content area is titled 'Family IDs' and features a '29 recommended items' filter. It is divided into sections for 'People' and 'Pets'. The 'People' section lists Jackie McKinley (Owner, Birthday March 8th), Mark McKinley (Birthday December 11th), Sharron McKinley (Birthday October 1st), Bobby McKinley (with an 'Add 5 assets' button), and Janet Long (Birthday November 22nd). The 'Pets' section lists Fido McKinley (with 'Add 5 assets' and 'Pre-populated' buttons). Action buttons include 'Add more +', 'Add family member +', and 'Add pet +'.

Money

A complete view of client financial accounts.

- Bank Accounts
- Credit Cards
- Cryptocurrency
- Investment Accounts
- Loans

The screenshot shows a web application interface for 'Trustworthy. McKinley Family'. The main section is titled 'Money' and displays a list of financial accounts. The interface includes a sidebar with navigation options, a search bar, and a table of account details.

Trustworthy. McKinley Family

Money

48 recommended items >

Name	Type	Account	Holders
Jackie's Savings Account	Bank account	Savings •••••9286	Jackie McKinley
New Bank Account	Bank account		Add 5 items
Jackie's Credit Card	Credit card	Main Street Bank •••••3881	Jackie McKinley
New Credit Card	Credit card		Add 7 items
Mark's Cryptocurrency	Cryptocurrency	Last updated 1/12/2023	
New Cryptocurrency	Cryptocurrency		Add 2 items
Mark's Retirement Account	Investment account	Retirement	Jackie McKinley, Mark...
New Investment account	Investment account	Brokerage	Add 3 items

Property

Property information and details cross-referenced to other relevant categories like mortgage, insurance, utilities and other home maintenance services.

- Real Estate
- Vehicles
- Jewelry
- Artwork
- Other Property
- Etc.

The screenshot displays the 'Trustworthy' app interface for the 'McKinley Family'. The main content is divided into two columns. The left column features a property card for 'Redwood City Home' (Real Estate) with a house icon. Below this are sections for 'Reminders' and 'Additional Contacts'. The 'Reminders' section lists two tasks: 'Update homeowners policy' (due Feb 2, 2025) and 'Change water filters' (due Jun 8, 2024). The 'Additional Contacts' section lists Sharon McGee, a real estate agent with phone number (206) 829-4179 and email smcgee@realestate.com. The right column is titled 'Ownership' and 'Owned'. It contains a table of owners and a section for mortgage and insurance. The 'Owners' table lists Jackie McKinley (Account Owner), Trustworthy LLC (LLC), and Mark McKinley (Business Partner). The 'Mortgage' section shows a Main Street Bank mortgage with account number ending in 7893. The 'Insurance' section shows a Main Street Insurance policy with account number ending in 2546.

Trustworthy. McKinley Family

< Property

Redwood City Home
Real Estate

Reminders Add +

- Update homeowners policy
Redwood City Home
Feb 2, 2025
- Change water filters
Redwood City Home
Jun 8, 2024

Additional Contacts Add +

Sharon McGee
Type: Real estate agent
Phone: (206) 829-4179
Email: smcgee@realestate.com

Ownership Owned

Owners

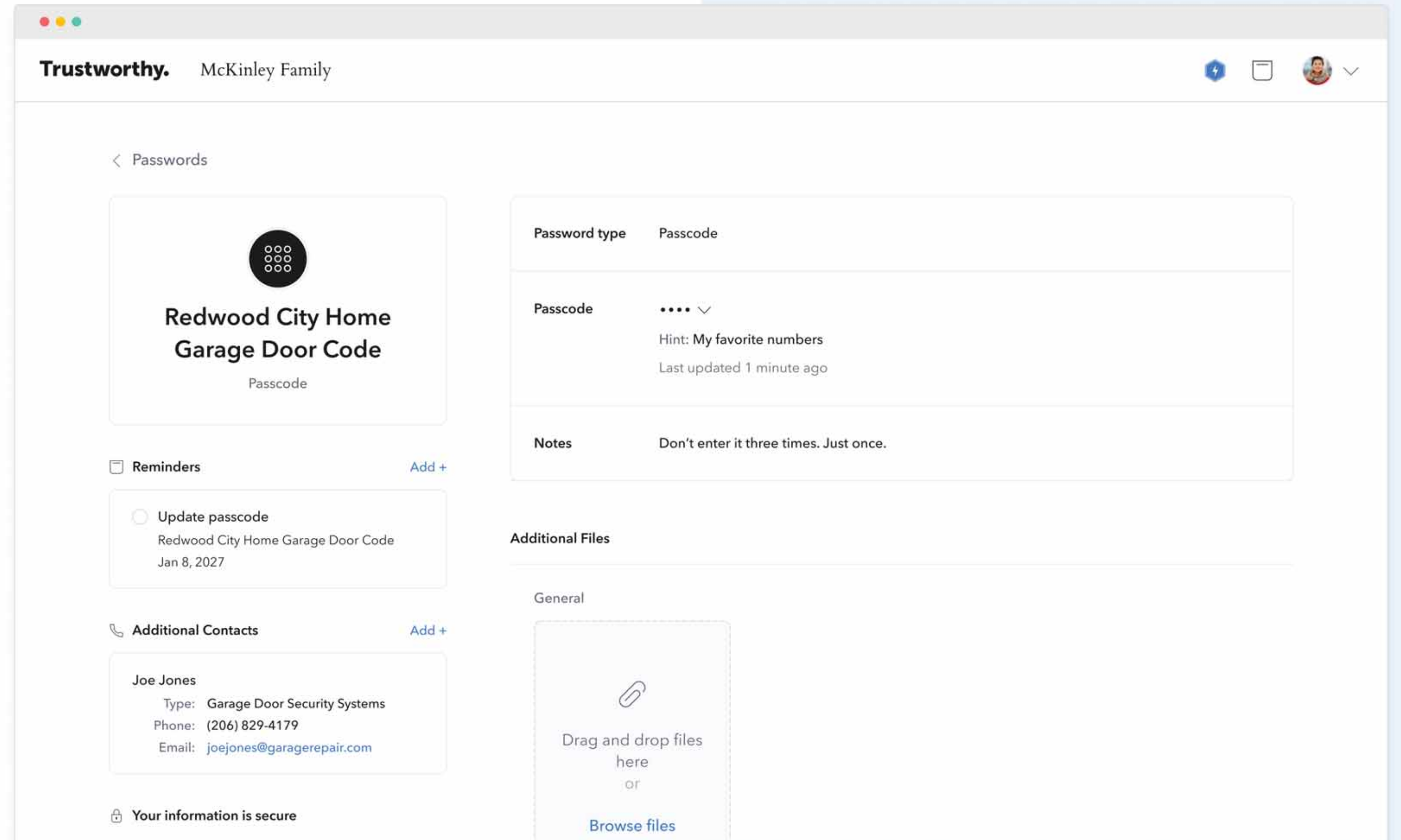
Name	Type	
Jackie McKinley	Account Owner	Go to this Family ID
Trustworthy LLC	LLC	Go to this LLC
Mark McKinley	Business Partner	Go to this contact

Mortgage Main Street Bank
Account:7893
[Go to this mortgage](#)

Insurance Main Street Insurance
Account:2546
[Go to this policy](#)

Passwords

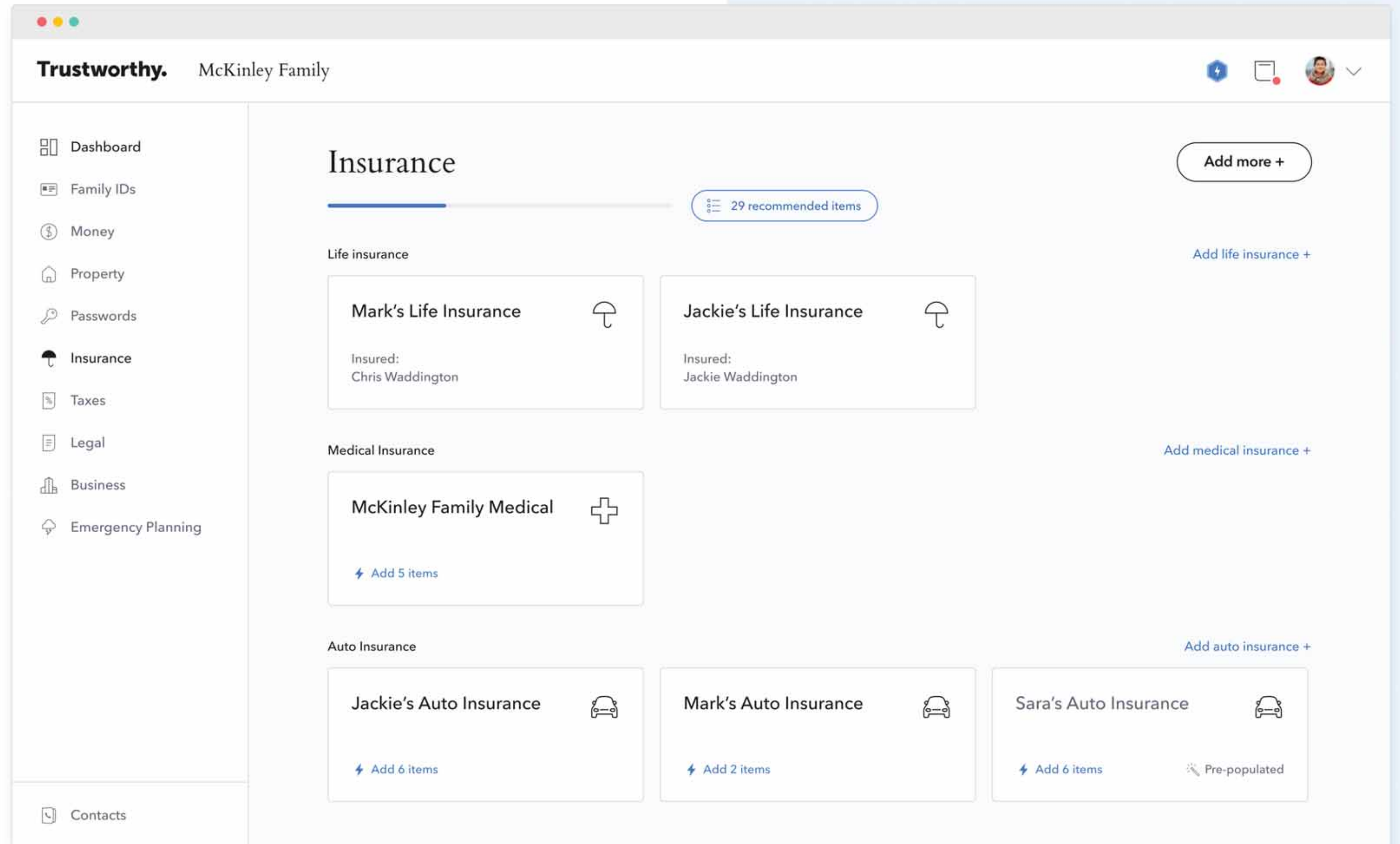
Securely store passwords and passcodes to devices, subscription accounts, properties and more.



Insurance

Manage client household insurance policies with a view of providers, policy numbers, agent details, and related documents.

- Life Insurance
- Medical Insurance
- Auto Insurance
- Homeowners Insurance
- Umbrella Insurance
- Other Insurance



Taxes

The screenshot shows a web application interface for 'Trustworthy. McKinley Family'. The main section is titled 'Taxes' and displays a list of tax returns. A sidebar on the left contains navigation options: Dashboard, Family IDs, Money, Property, Passwords, Insurance, Taxes (highlighted), Legal, Business, Emergency Planning, and Contacts. The top right corner has a user profile icon and a notification bell. A button labeled 'Add more +' is in the top right of the main content area. Below the 'Taxes' header, there is a sub-section 'Tax Returns' with a filter for '29 recommended items'. The tax returns are listed as follows:

Year	Status
2023	In progress
2022	Filed
2021	Filed
2020	Filed
2019	Filed

Legal

Organize client legal documents: wills, trusts, healthcare proxies, etc.

Remind your clients to review and update their legal documents on a regular basis.

- Will
- Trust
- Power of Attorney
- Medical Directives
- Other Legal Documents

The screenshot shows the 'Trustworthy' interface for the 'McKinley Family'. The top navigation bar includes the logo, the family name, and user profile icons. A left sidebar lists various document categories: Dashboard, Family IDs, Money, Property, Passwords, Insurance, Taxes, Legal (highlighted), Business, and Emergency Planning. The main content area is titled 'Legal' and features a '10 recommended items' filter. It is organized into sections: 'Wills' (Jackie's Will, Mark's Will), 'Trusts' (McKinley Family Trust), 'Power of Attorney' (Jackie's Power of Attorney, Mark's Power of Attorney), and 'Medical Directives'. Each document card includes a title, a 'Date created' field, and an 'Add' button with a lightning bolt icon. The interface also includes 'Add more +' buttons and 'Add [document type] +' links on the right side.

Business

Document client business holdings including formation documents, ownership agreements, business taxes and financial documents.

- Shareholders
- Contacts
- Money
- Taxes
- Property

The screenshot shows the Trustworthy app interface for the McKinley Family. The main view is for the business "Merriweather & Lewis Exploration LLC".

Business Details:

- Jurisdiction:** California, United States
Headquarters: 351 Quay Ln, Redwood City
- Formation Date:** Jan 1, 2019
- Tax ID:** [Redacted]

Shareholders & Owners:

Name	Type	Ownership
Jackie McKinley	Account Owner	Shares: 85%
Trustworthy LLC	LLC	Shares: 10%
Mark McKinley	Business Partner	Shares: 5%

Reminders:

- Send taxes to accountant
Merriweather & Lewis Exploration LLC
Jan 8, 2024
- Update Ownership Agreement
Merriweather & Lewis Exploration LLC
Jan 20, 2024

Additional Contacts:

- Tim McGee
Type: Accountant
Phone: (206) 829-4179

Formation Documentation:

- 2019 LLC Certificate of Formation

Ownership Agreements:

- 2019 Certificate of Good Standing

Emergency Planning

Help your clients be prepared for unexpected events.

- Important Instructions
- Emergency Equipment
- Letters to Loved Ones

The screenshot shows a web application interface for "Trustworthy. McKinley Family". The main heading is "Emergency Planning" with a sub-header "30 recommended items". The interface is divided into three sections: "Important Documents", "Emergency Equipment", and "Letters to Loved Ones".

Important Documents:

- Jackie's Allergies** (Last updated: January 10, 2022)
- Babysitter Instructions** (Last updated: September 2, 2022)

Emergency Equipment:

- Kitchen Fire Extinguisher** (Location: In the kitchen behind the door.)
- Family Go Bag** (Location: In the mud room under the bench.)

Letters to Loved Ones:

- Letter to Jackie** (For: Jackie, From: Mark)
- Letter to Mark** (For: Mark, From: Jackie)

The left sidebar contains navigation options: Dashboard, Family IDs, Money, Property, Passwords, Insurance, Taxes, Legal, Business, Emergency Planning (highlighted), and Contacts. The right sidebar has "Add more +" buttons for each section.

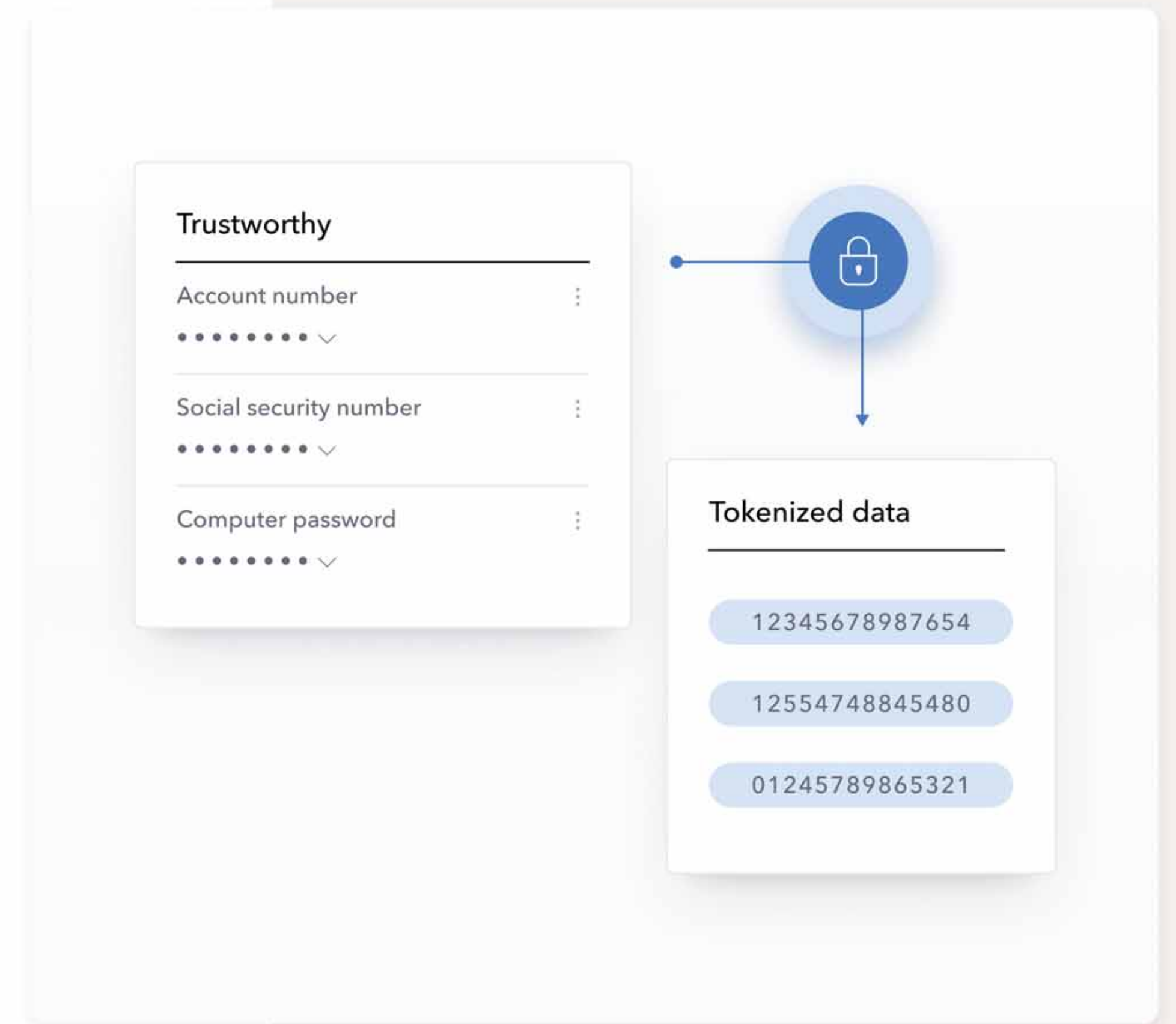
Trustworthy

The Family Operating System[®]

World-class security and privacy

Trustworthy was designed to shield families and their advisors from breaches, identity theft, and other security threats. Trustworthy security practices include:

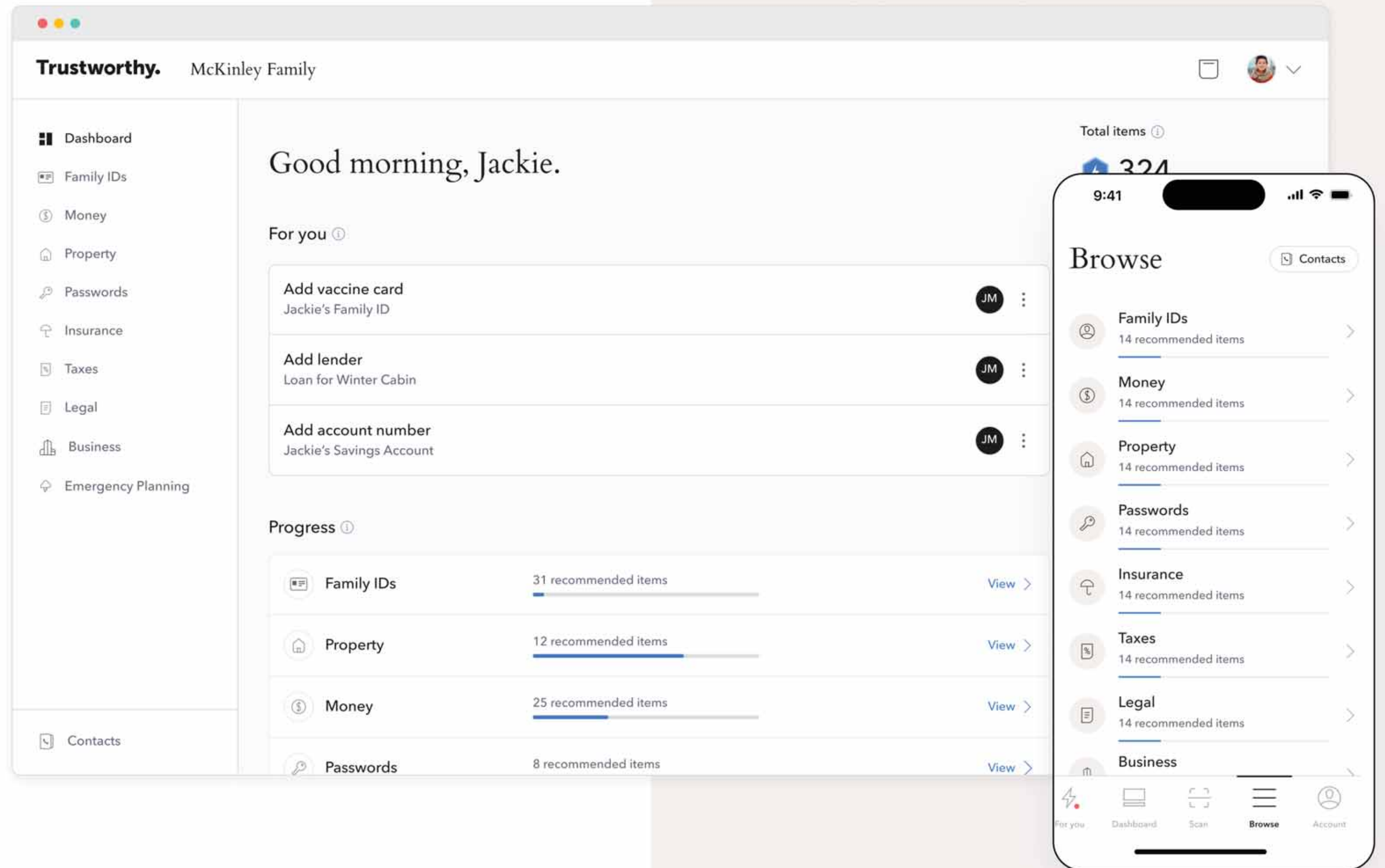
- AES 256-bit encryption
- Multi-factor authentication
- Biometric authentication
- Data tokenization
- SOC 2 Type 2 certification
- SOC 3 certification
- HIPAA compliance
- GDPR compliance
- YUBI hardware security keys
- Independent security audits and penetration testing
- Activity audit logs



Available on desktop & mobile

Access client information from a desktop or mobile device using our responsive web experience or native iOS app.

All the information you need, wherever you are. In the office or on the go.



The Trustworthy Marketplace™

Exclusive savings on a range of third-party services and apps to improve your system. Browse the marketplace at: Trustworthy.com/marketplace.

The screenshot displays the Trustworthy Marketplace website interface. At the top, the navigation bar includes the Trustworthy logo, menu items for Solutions, Features, Resources, Pricing, and Company, and links for Login and Try Trustworthy free. A prominent 'Talk to sales' button is located in the top right corner. The main content area features six product cards arranged in a 2x3 grid. Each card includes the product logo, name, offer details, a brief description, and a call-to-action button.

Product	Offer Details	Description	Call to Action
1Password	2 months free on Family Plan	1Password is the easiest way to store and use strong passwords. Log in to sites and fill forms securely with a single click.	REDEEM OFFER
Beagle	\$35-\$120 off subscription plan	Beagle helps you find, rollover, and consolidate your 401(k)s. Access to your retirement money early with no tax or penalties.	REDEEM OFFER
EZ-Probate		EZ-Probate provides an online solution for probate. They offer a self-help DIY service as well as an affordable, flat-fee attorney service.	LEARN MORE
Keeper		Keeper is a password manager that allows users to store online login credentials,	
LawDepot	40% off		
Life360	\$35-\$120 off subscription plan		

Trustworthy Recommendation Engine™

The Trustworthy Recommendation Engine (patent pending) anonymously analyzes your responses against thousands of peer households so you receive a personalized set of recommendations for your family.

McKinley Trust



⚡ Add 5 items

🔍 Pre-populated

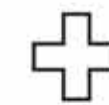
McKinley Family Medical Insurance



⚡ Add 8 items

🔍 Pre-populated

Jackie's Medical Directives



⚡ Add 10 items

🔍 Pre-populated

Jackie's Saving's Account



⚡ Add 12 items

🔍 Pre-populated

Mark's Car Insurance



⚡ Add 2 items

🔍 Pre-populated

Mark's Credit Card

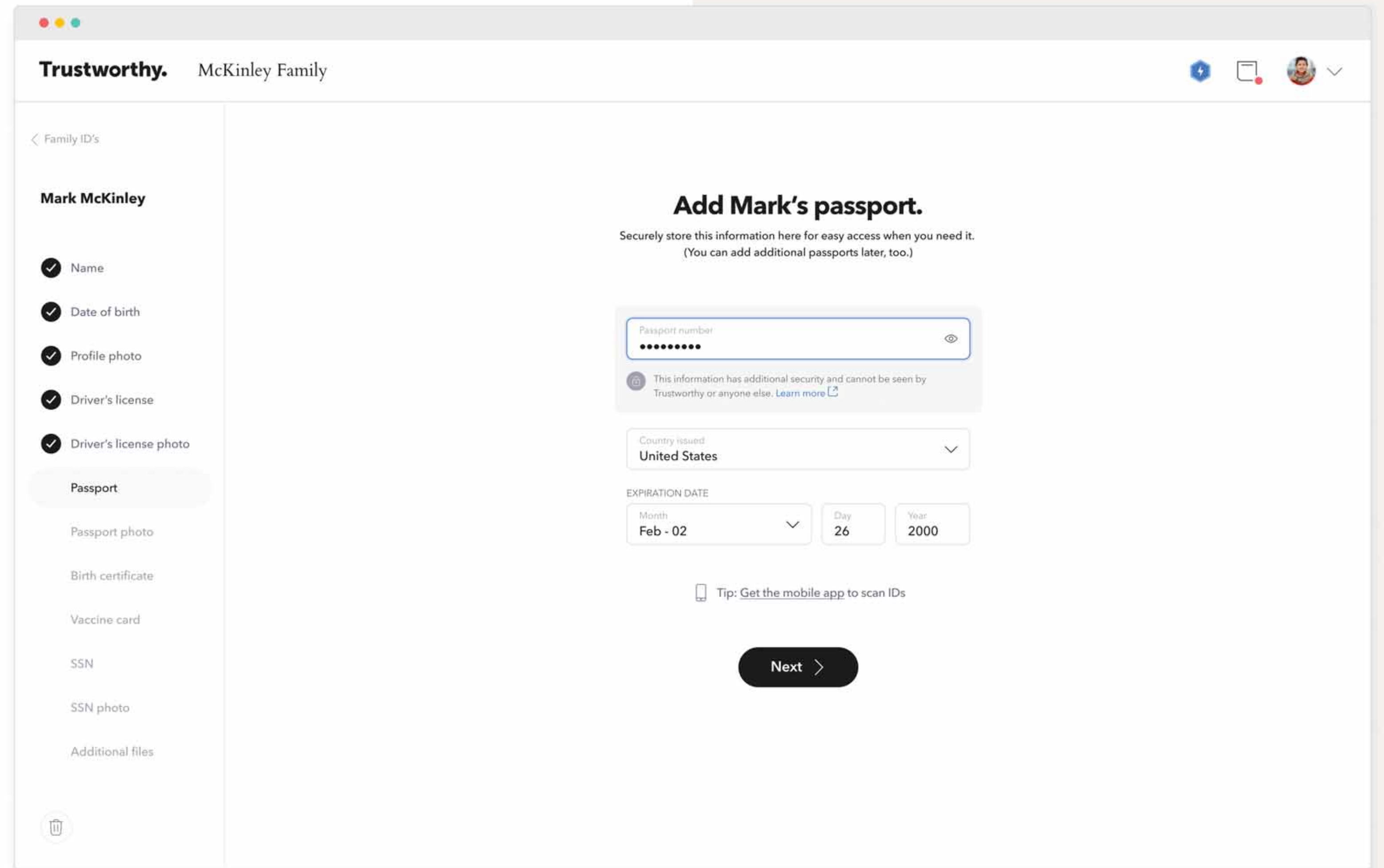


⚡ Add 5 items

🔍 Pre-populated

Guided workflows

Guided workflows lead you through the delivery of each item to capture all your important information and help you remember what you need to know.



Automatic organization

The perfect visualization of your information, meticulously designed to help you find what you need, when you need it.



Main Street Bank
Checking ***5435



2019 Family Car
License Plate LR313B



Jackie's Credit Card
Credit Card ***5435



Jackie McKinley
Birthday August 20th



McKinley Family Trust
Created March 2, 2021



Fido McKinley
Birthday January 4th

Automatic & manual reminders

Trustworthy automatically creates document reminders to help you stay on top of critical tasks.

You can Set up your own manual reminders for unique occasions and appointments.



Reminder created.

Trustworthy will alert you every year to review the McKinley Family Trust.

Continue >




Reminders

[Add +](#)

- Renew passport**
Matthew McKinley's Family ID
Jan 8, 2027
- Renew driver's license**
Matthew McKinley's Driver's License
Dec 1, 2027

Linked items




Connect items to pertinent information, like homeowner insurance for real estate or car payments to your vehicle and seamlessly navigate between all of your items.

Beneficiaries		
Name	Type	
 Jackie McKinley	Account Owner	Go to this Family ID
 Merriweather & Lewis LLC	LLC	Go to this LLC
 Mark McKinley	Business Partner	Go to this contact

Property		
Name	Type	
2340 Towne Lake Parkway - Chicago, IL	Own	Go to this property
Parcel 2432 - Vargas, OK	Own	Go to this property
112 Main St. Apt #4 - Delray Beach, FL	Own	Go to this property

Linked items

Connect items to pertinent information, like homeowner insurance for real estate or car payments to your vehicle and seamlessly navigate between all of your items.

Beneficiaries		
Name ▾	Type ▾	
 Jackie McKinley	Account Owner	Go to this Family ID
 Merriweather & Lewis LLC	LLC	Go to this LLC
 Mark McKinley	Business Partner	Go to this contact

Property		
Name ▾	Type ▾	
2340 Towne Lake Parkway - Chicago, IL	Own	Go to this property
Parcel 2432 - Vargas, OK	Own	Go to this property
112 Main St. Apt #4 - Delray Beach, FL	Own	Go to this property

Enriched information

Trustworthy adds additional relevant information to your items—like a bank's phone number or a health insurer's URL.




Mark & Jackie's Checking Account

Bank Account

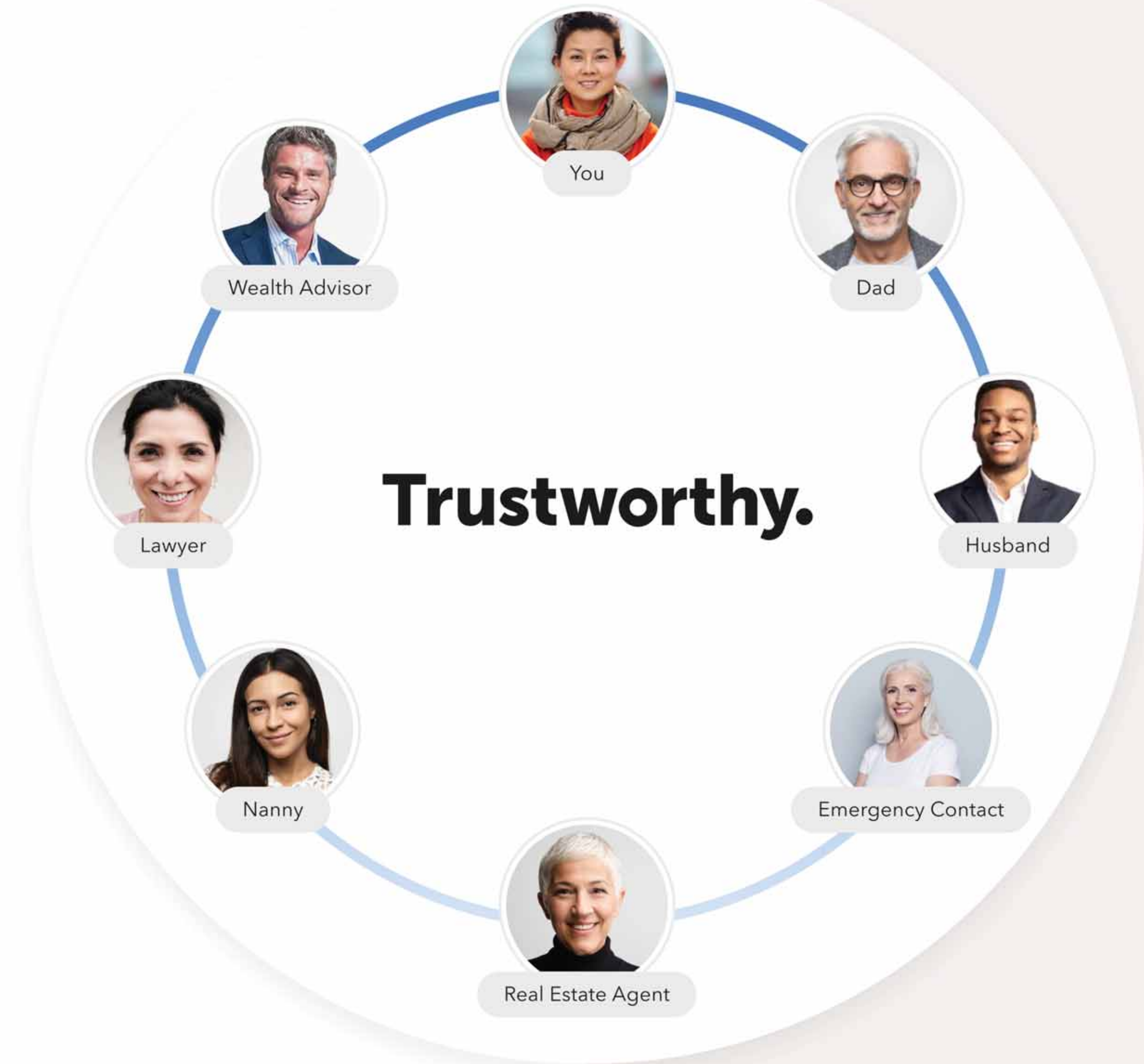
 Main Street Bank

 <https://www.mainstreetbank.com>

 (202) 555-0106

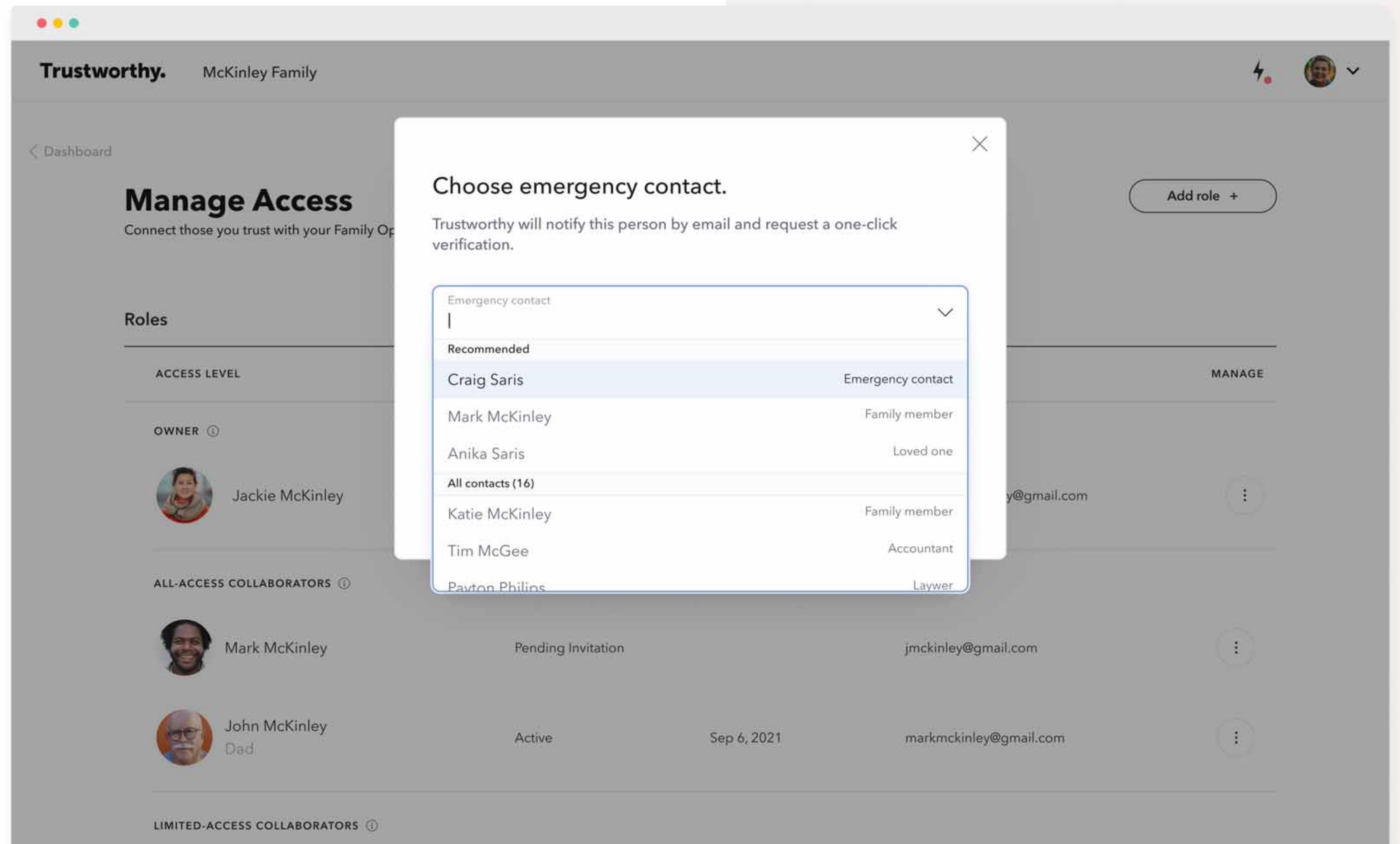
Unlimited collaborators

Trustworthy is a multiplayer system to embraces your entire household trust graph. From family members to your trusted network of professionals who help you run critical elements of the Family Operating System.



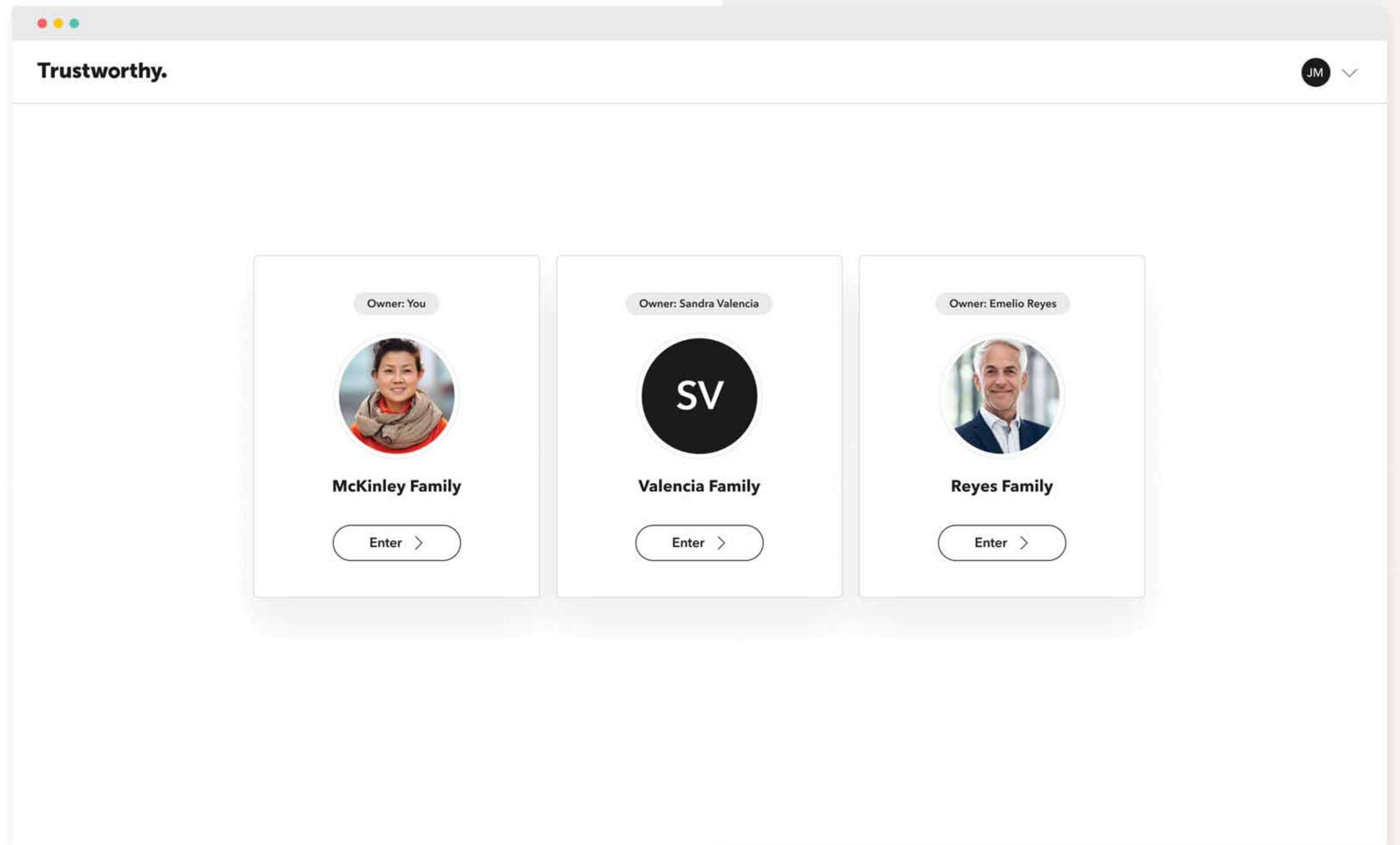
Unlimited emergency contacts

Emergency contacts only have access to information in case of an emergency. They're verified at invite and undergo the Trustworthy unlock process to have access to system information when the moment arrives.



Multi-household access




Access an unlimited number of client households from a single login. Manage and navigate between them seamlessly.







Assignable to do's

Give action items and to-do lists to family members and the professionals you trust with household categories.

For you ⓘ

- Add vaccine card**
Jackie's Family ID  ⋮
- Add lender**
Loan for Winter Cabin  ⋮
- Add account number**
Jackie's Savings Account  ⋮

Assign items to:

-  Jackie McKinley (you) ⋮
-  Mark McKinley
-  Leslie Hanson
-  Add new collaborator

Expert support

Send a text, call, or schedule a video conference with a Trustworthy Expert to receive the personalized help you need to manage household information. Services include but are not limited to:

- Turnkey implementation service
- One-on-one or family onboarding sessions
- Document replacement service
- Outsource gathering documents from advisors and other sources

