

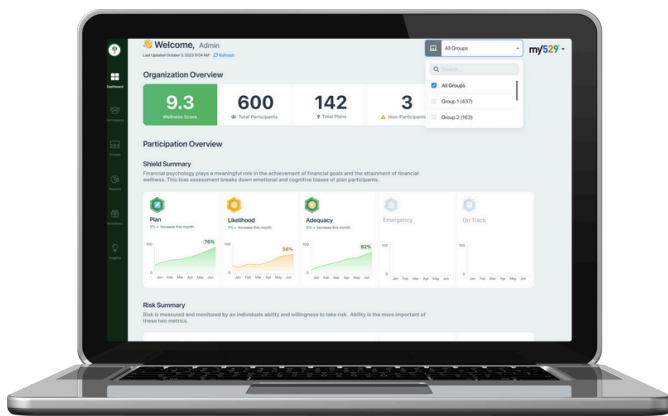


TROUTWOOD

It's a great day to build a financial plan.

Conflict-free financial planning and investment education resources for households, your community and your employees.

- ✓ Informed Decision Making
- ✓ College & Career Planning
- ✓ Legacy Planning



SECONDARY EDUCATION

Help parents increase 529 savings by modeling college and career decisions using real costs and expenses. Educate families on choosing a path after graduation with scenario modeling with current 529 savings.



POST-GRADUATE EDUCATION

Choosing to return to school mid-career or going straight to post-secondary education after undergrad is a big decision with financial implications. Work with beneficiaries to allocate unused 529 funds, increase contributions, or open a new 529.



TRADES & CERTIFICATIONS

Educate families and beneficiaries to take advantage of 529 funds to pursue a trade or certification. Troutwood enables users to model career changes and cost of living projections to help make informed decisions on what is right for them.



UNUSED 529 FUNDS

With the Secure 2.0 act, families are no longer in a use it or lose it scenario. From legacy planning to opening a Roth IRA, Troutwood helps users understand the long term value and helps provide informed decisions for each individual.