



TROUTWOOD

Empower your people with a plan for life.



TROUTWOOD APP

Financial Planning & Budgeting

FEATURES



Troutwood Pro: Live your financial plan. Achieve your financial goals. Create and maintain real-time budget; set and align financial goals; model for and make smart financial decisions.



Plan



Budget



Balance Sheet



AI Chatbot



Accounts



Calculators



Debt Hub



Achievements



ENTERPRISE DASHBOARD

Financial Planning & Budgeting



Support, incentivize and interact with small and large participant populations - students, employees, beneficiaries - people you care about.

FEATURES



Dashboard



Resources



Participants



Reports



Incentives



Messaging

Welcome, Admin
Last Updated October 3, 2023 9:04 AM [Refresh](#)

Organization Overview

9.3	Wellness Score	139	Total Participants	142	Total Plans	3	Non-Participants
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Participation Overview

Shield Summary
Financial psychology plays a meaningful role in the achievement of financial goals and the attainment of financial wellness. This bias assessment breaks down emotional and cognitive biases of plan participants.

Plan
2% Increase this month

Likelihood
1% Increase this month

Adequacy
5% Increase this month

Emergency

On Track



OTHER OFFERINGS



Map of the Markets: An interactive stock market map for individual investors. Designed to help you gain the confidence and knowledge to be a better, and longer-term, investor.



Calculators and Tools: Our money choices have consequences. Model your financial decisions before you make them.



AI Overlay: A proprietary financial guide that gives user-specific, AI-driven financial insights and action steps.



The Missing Semester: Two award-winning personal finance books with an accompanying 250+ question quiz bank and a short video for each chapter.

Troutwood's conflict-free financial planning and empowerment platform supports people at any stage in their financial journey.