



TROUTWOOD

Empower your people with a plan for life.



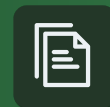
TROUTWOOD APP

Financial Planning & Budgeting



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.

FEATURES



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



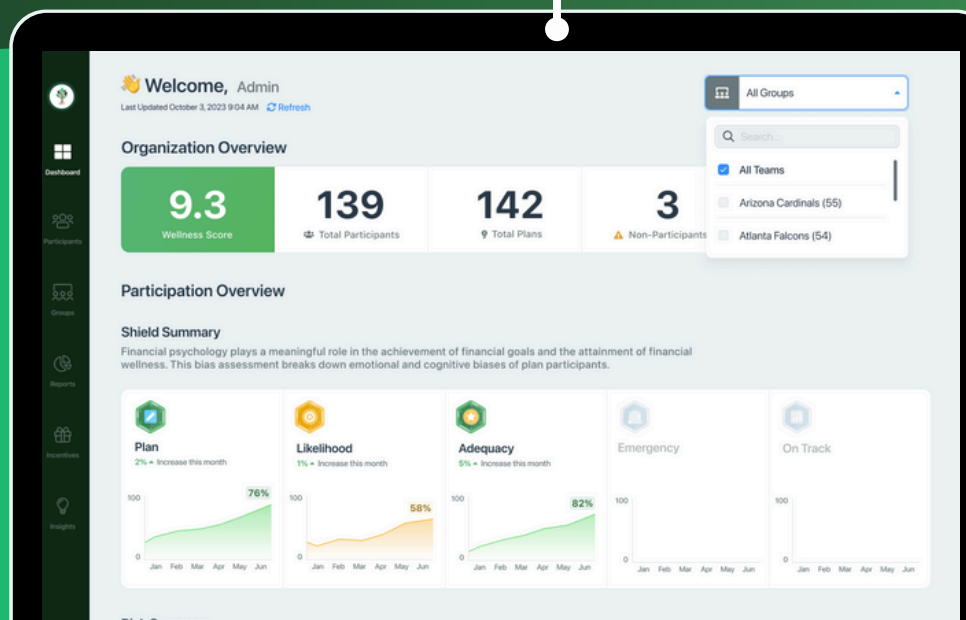
Reports



Incentives



Messaging





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.