

## SAMPLE USER

**Georgia is a mother of 2 who works as a home health aide.** She is burdened by credit card debt and a \$10,000 medical bill from the birth of her youngest son. One day, she receives an email from her employer that she's eligible for TrustPlus.

**Georgia clicks the link** in the email to create an account in the TrustPlus portal. She fills in the intake survey, pulls her credit report, and links her bank acct.

**She scans the Financial Coaches' bios,** then schedules a session to discuss tackling her debt. Georgia has monthly sessions with her Coach, during which they discuss her options and identify 'Take Action Today's' (TATs). Between sessions, she uses the TrustPlus portal to track her progress towards her goals and reference her budget and action plan. She receives text reminders about, for example, upcoming action-steps or policy updates.

**Today, Georgia has paid off her credit card debt** and is on an affordable payment plan to pay off the remainder of her medical bill, which her Coach helped her negotiate down by half. She was also able to save up to take her kids on a trip to visit their grandparents in Virginia.

## EMPLOYERS/BENEFITS PROVIDERS

**Institutional customers purchase TrustPlus** to support the financial health of the workers they reach, given growing market demand.

**Our insights-generation process kicks off**—credit reports, transaction data, and intake surveys are aggregated and anonymized. Customers can also opt to share a census file and/or integrate SSO to capture product usage data.

**With each session, Coaches capture the context** of clients' lived experiences by layering qualitative case notes, issue flags and 'Take Action Today's' (TATs), onto clients' quantitative data profiles. The TrustPlus team uses this nuanced, segmented picture of worker financial health to turn pain points into opportunities for intervention. We deliver tailored, vetted product and practice recommendations to stakeholders, so they can successfully address their workers' & users' needs at large.

**Employees & benefits providers** see an improved bottom line as a result of better serving their workers, exemplified by increased retention, job satisfaction and productivity.

## FINANCIAL INSTITUTIONS / FINTECHS

**Financial servicers are equipped** to make their products more inclusive, relevant and affordable, making their customers more financially secure and more loyal.