About Trellis

- Nonprofit 501(c)(3) student loan guarantor with 40-year record of delivering positive outcomes for student borrowers
- Guaranteed over $74 billion in loans to more than 4 million student borrowers and their parents
- Borrower satisfaction of 4.38/5 (3-year avg.)
- Default prevention cure rate of 89.2%, with $2.1 billion in potential defaults averted
- Claims rate accuracy of 99.9%
- Exemplary audit and compliance history
- Nationally recognized research and analytics
Trellis Project Success Footprint

40 INSTITUTIONS IN 5 STATES

306,000 STUDENTS ANNUAL ENROLLMENT

27 HBCUs; 10 HSIs; 3 PBIs
<table>
<thead>
<tr>
<th>Student Facing Services</th>
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<tbody>
<tr>
<td>MOBILE-FIRST MESSAGING CAMPAIGNS</td>
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<tr>
<td>FAFSA AND VERIFICATION COMPLETION SUPPORT</td>
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<tr>
<td>STOP-OUT ENGAGEMENT</td>
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<td>SUMMER MELT</td>
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<td>OUTBOUND CALL SUPPORT</td>
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<td>DEFAULT PREVENTION</td>
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<td>STUDENT COACHING</td>
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<td>IN PERSON / ONLINE FINANCIAL LITERACY</td>
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Institutional Support Services

RESEARCH AND ANALYTICAL SERVICES
- Retention Profiles
- Student Financial Wellness Survey
- CDR Analysis
- Exit Surveys

STAFF AND FACULTY PROFESSIONAL DEVELOPMENT
- Customer Service Training
- Retention Analysis and Best Practices
- Student Financial Wellness Briefings
- Communication to Students Training

INSTITUTIONAL POLICY, PROCEDURE, AND PROCESS CONSULTING
- Enrollment Management Strategic Planning, Dashboard
- Stop-Out Engagement
- Communicating Financial Clearance, Financial Aid Offers

COMMUNICATION CAMPAIGN DEVELOPMENT
Service Offerings

**RESEARCH SERVICES**
50,000+
STUDENTS
PARTICIPATED IN THE
STUDENT FINANCIAL WELLNESS SURVEY
SPRING 2018, FALL 2018, & FALL 2019

**FINANCIAL EDUCATION**
52,000+
ONLINE MODULES
COMPLETE SINCE INCEPTION

**MOBILE COMMUNICATION SERVICES**

<table>
<thead>
<tr>
<th>Year</th>
<th>Text Messages Sent</th>
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<tr>
<td>2017</td>
<td>12,601</td>
</tr>
<tr>
<td>2018</td>
<td>314,295</td>
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<tr>
<td>2019</td>
<td>935,617</td>
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128 institutions in 28 states

RESEARCH SERVICES

FINANCIAL EDUCATION

MOBILE COMMUNICATION SERVICES
Service Offerings

**DEFAULT PREVENTION SERVICES**
Trellis contacts an average of

6,766
Grace Period

AND

20,482
Delinquent Student Loan Borrowers Each Month

**VIRTUAL COACHING AND OUTREACH**

The coaching team made over

40,000 Outreach Calls

For colleges on topics such as re-engaging stop-out students, loan verification, and special term enrollment

500 Virtual One-on-One Coaching Sessions

With students on goal setting, budgeting, and understanding financial aid and student loans
Case Studies and Highlights
Examples – Text Message Outreach

LARGE 4-YEAR PRIVATE INSTITUTION

Summer 2018 summer text outreach –
Increased summer enrollment by approximately 2.5% (600 students) from prior year

Fall 2018 housing text messaging campaign supported increase in housing occupancy – 56 more students, achieving a 97% occupancy rate

Fall 2018 texting increased the number of UNCF recipients by 31% over prior year

Increased attendance at Career Fair by 41% over prior year
Examples

**COMMUNITY COLLEGE SYSTEM**

Spring 2019 registration campaign – Trellis sent 2,257 text messages and made 2,697 phone calls to inform students of payment deadline

- 2,000 student improvement in the number who remained registered for the term vs. two prior years

**COMMUNITY COLLEGE CAMPUS**

Fall 2018 re-enrollment campaign – Trellis calls resulted in 113 stopped-out students re-enrolling at the college
Questions and Answers