

Trust Asset Management Program

A Proven Solution

For over 35 years, Trust Asset Management Program has stood out as a market-leading solution, trusted by financial institutions across the nation. More than 50 banks and client depend on our expertise, advanced technology, and steadfast commitment to exceptional service

- **Engineered for Growth and Flexibility**

Designed to facilitate growth and enhance flexibility, our platform eliminates traditional system constraints, empowering banks to manage an unlimited number of assets with confidence and efficiency. Each interface can be customized to fit your institution, offering a tailored, intuitive experience that integrates seamlessly with your internal processes.

- **Tailored Solutions for Your Needs**

Whether you seek a robust back-office partner to bolster your current operations or a comprehensive brokerage solution that manages everything from placement to servicing, Trust Asset Management Program adapts to your requirements. We leverage our long-standing relationships with Chubb, Travelers and Zurich to offer extensive, competitive coverage options for your fiduciary portfolios

With decades of proven experience, a client-first approach and a scalable platform, Trust Asset Management Program empowers financial institutions, private trust companies, and wealth management firms to enhance their fiduciary services and provide greater value to their clients

www.trustdata.com



Megan Hogan
400 Chesterfield Center
Chesterfield, MO 63017
(314)206-4123
MHogan@craneagency.com
craneagency.com

Trust Asset Management Program

Fact Sheet

FEATURES:

- Paperless Application Process
- Screens can be customized for an individual bank
- Real Time Invoicing & Automated Billing
- Digital ID & Encrypted Data
- Unlimited Users – No Software Installation Required
- Mid-Term Policy Additions & Changes
- Online Asset Tracking and Reporting
- Insurance Reviews & Certificates
- External Coverage Letters & Renewals
- Multiple Asset Search Lookup

SYSTEM BENEFITS:

- On-Line Reporting Tools
- Policy Renewal Reminders
- Unique User Security Levels
- Hot Site Data Backup

BANK INTERGRATION:

- Interfaces with Bank Software
- Rating Formula for Any Carrier

IMPORTANT TO KNOW

We can act as the backroom for the program or the full-service broke

