Momentum TrustManagement

Trust Management Software
CRM+ | Portfolio Analytics | Document Management

> Customer portal mobile app for both iOS and Android.

> Maximize Productivity   > Improve Client Relations   > Grow Your Business

It all starts with the Dashboard!

When you log into MomentumTRUST you are presented with a dashboard displaying real-time portfolio snapshots of key account factors. The dashboard is designed to help you strategically plan your day.

Integrated with trading software, the dashboard pulls transactions and pricing to provide users with real-time valuations of all customer accounts. The social network style lets users leave notes on almost any entity and track those over time.

Dashboard Highlights:

1. Alert system to notify users of important events

2. Useful information at a glance including: High Cash Accounts, Overdrafts, Accounts Out of Balance, Upcoming Reviews and Favorite Accounts

3. Endless scrolling data to increase performance and usability

4. Interactive charts

5. Universal search available anywhere in the application

MomentumTRUST is a cloud-based software solution that integrates Advanced CRM, Portfolio Accounting/Analytics and Document Management, all in one application.

Revolutionize how you do business and instantly increase efficiency, improve customer relations and gain valuable time to grow your business with MomentumTRUST's dynamic platform.

MomentumTRUST features include:

> Account Management
- > Account valuation and balance
- > Account breakdown by asset
- > Investment strategy management
- > Exception based reporting
- > Dashboards
- > Integration with SEI's system and third-party financial systems providing real-time financial data
- > May be integrated with other market research and data tools

> Document Management
- > Bills paid on behalf of client
- > Trust documents, Client Correspondence
- > In-system scanning and storage

> Advanced Contact Management
- > Customers, prospects, contingents, beneficiaries, etc. with advanced methods of organization

> Investment Policy Statement Generation & Management

> Notes Management
- > Notes are organized and managed by user defined roles. i.e. portfolio manager, marketing administrator, assistant

> Marketing and Event Management
- > Campaigns, Events, Networking, etc.

> Favorites List
- > Indicate those account that need to be closely monitored

> Universal Search

> Integrated security

> Cloud or Local Hosting
- > Accessible 24/7 from any device

Coming Soon...
> Workflow Management

Contact Wes Buxton to schedule your demo and complimentary consultation.

918-760-5921
wbuxton@momentum3.biz

Microsoft Partner