

Proxytrust

Produces Huge Time Savings for Private Trust Company

CASE STUDY >>>>

For more than a decade, a leading independent trust company with over \$400 million Assets Under Management and more than 500 accounts has relied on Proxytrust to manage its proxy voting responsibilities. The company has expressed great satisfaction with Proxytrust's services and benefits, including:

IMPROVED EFFICIENCY

According to a seasoned investment officer with this private trust company, Proxytrust's technology saves them hundreds of man-hours each year through its policy voting services. "Proxytrust's ISS policy voting has been an immense time saver for us," he stated. "This feature cuts down on having to manually handle every proxy material that comes in; instead we are able to vote according to the policy and our vote is automatically applied."

In addition to saving time, customers also benefit with financial savings. Proxytrust offers automated policy-driven voting via ISS/Risk Metrics Group (www.issproxy.com) at no additional cost.

SEAMLESS INTEGRATION

Proxytrust provides a direct daily interface with Sungard Charlotte. "One of the perks of Proxytrust is that they integrate well with our existing trust platforms, so our data is automatically downloaded," he continued. "It's seamless."

"We focus solely on trust institutions and we're committed to helping our customers exceed their compliance requirements, improve efficiency, and boost their bottom line."

- John Jansing
Proxytrust President

RECORD KEEPING CAPABILITIES

In the financial services industry, record keeping and reporting are crucial. Proxytrust provides a comprehensive database of voting activity for both discretionary, or bank voted, and non-discretionary, or client voted, accounts.

ELECTRONIC PLATFORM

The use of web-based technology means substantially less paper is consumed, which saves both money and natural resources. Additionally, Proxytrust's electronic access enables users to access the entire Edgar-online SEC filings library as well as hyperlinks to company websites.

Additional electronic perks include real time results and email vote alerts, which notify users of upcoming un-voted meetings, helping to guard against missed votes.

SUPERIOR CUSTOMER SERVICE

Proxytrust is managed by a veteran team of proxy and trust professionals, focused solely on the needs of trust institutions.

According to the trust company's investment officer, another benefit of working with Proxytrust has been assistance with handling unique situations. For example, if proxies need to be sent to specific clients, Proxytrust distributes a proxy to the particular entity that needs to vote, again resulting in significant time savings for the company. "Proxytrust's combination of technology and customer service just makes our job easier."

"Our clients work hard to deliver exceptional customer service, and we hold ourselves to that same high standard," stated Proxytrust President John Jansing. "We focus solely on trust institutions and we're committed to helping our customers exceed their compliance requirements, improve efficiency, and boost their bottom line."