

## TrusteSolutions offers exceptional support to ambitious trustee assistant supporting two trustee practices.

### Background

Darlene Anderson is a well-known and respected trustee assistant and office manager supporting two busy trustees in Boca Raton, Florida. She will be celebrating 28 years with the firm in 2020. She was an NABT board member for 6 years and can often be found helping other trustees with her wealth of valuable knowledge and expertise. She has transformed her office into a cloud-based and paperless office environment. TrusteSolutions is proud to offer tools to support her effort.

### Situation

Darlene had been with another case management provider for eighteen years while supporting one trustee. She noticed the provider was not advancing quickly enough and she was having to do too much of her day-to-day work manually. She was lacking automation.

Then, a second trustee joined the firm and was using yet another case management software. The original trustee she was supporting transitioned to this software provider, as well. She expected this product to be better since they had a web-based product in addition to a PC product, but they were having issues with it. That's when she tried TrusteSolutions. She was aware of them from her involvement with NABT. She knew the TrusteSolutions platform originated on the web. Darlene quickly saw how much more advanced it was and moved both of the trustees she supported over to it. Since she was leading the charge on transforming their office into both a cloud-based and paperless office, this was a perfect choice. "It was a no brainer for me. TrusteSolutions is well above other web-based platforms out there."

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### Solution

The conversion was "fantastic" according to Darlene. It was quicker than her conversions with other providers. There were no issues with data, the banking side was flawless and all data on forms, TFRs and TDRs transitioned over just fine. According to Darlene, "it was pretty seamless." There was ongoing training, someone on-site once the data was converted, and an offer to have a trainer stay longer if needed. Her requests were always addressed and the TrusteSolutions team did whatever they could to comply with her requests. Darlene says, "the fear of conversion should never be a reason not to switch to another provider." And she should know, seeing as she's been through three conversions in her almost 28 years with this firm.

## Solutions for your professional practice

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Darlene states the biggest benefits of being on the TrusteSolutions platform are the following:

**Cost savings from a business standpoint** – With more and more offices having to shift resources due to changes in bankruptcies, having a case management software that allows you to get more done with less resources is incredibly cost effective and valuable. There is also a large time savings component due to automation. "Because of automation, I can take on more duties and support both trustee practices," Darlene shares. It has reduced the cost for the practices by eliminating the need for an extra person. "Without TrusteSolutions software, I'm not sure I could have effectively worked for both trustees. It would have been very difficult," says Darlene.



**Data accuracy** – Tools are in place to help with running reports for the US Trustee Office, TIR reports and audits. These tools catch errors so that they can be fixed before reports are submitted, saving time and hassle. Darlene has seen a definite improvement in audit reports, and she has gone through many audits. When an auditor asked what documentation she had as support, it was all right there and timestamped. She appreciates being able to do it right the first time and not have rework to do, supporting their office philosophy of: only touch it once when it comes onto your desk then move to the next thing.



**Staff knowledge of a trustee practice & the latest technology** – TrusteSolutions' staff's knowledge isn't just limited to the Chapter 7 trustee world. They can support their users in wearing multiple hats while using their software. Darlene can keep using the TrusteSolutions software for her other fiduciary duties and enjoys having one place to go for almost everything she needs to do. She definitely feels more in control. "Everything we need to support this office is 90% in the software," Darlene confides.



**Working remotely** – With TrusteSolutions, they can now access the system from 341 rooms, bankruptcy court or any place they are working outside of the office. Darlene was in charge of transforming their office into a total cloud-based office and needed integration support from a proactive software provider aware of the latest and greatest technology. Being cloud-based has been much easier to maintain and more efficient workwise. With TrusteSolutions' integration with Office 365, Darlene and her team have been able to utilize the full force of the technology they have. "TrusteSolutions always has their pulse on the latest and greatest technology and how it can work in a trustee office."

Another big advantage TrusteSolutions offers is superior response time from a well-trained support team. The TrusteSolutions staff make every attempt to work through any issue you're experiencing. In Darlene's experience, most of the time the first contact with the support team solves the issue completely. She has found that they are well-trained on the TrusteSolutions platform as well as the products that integrate with it. Darlene says, "They are major life savers. They went above and beyond, saving us lots of time," Darlene declares. Additionally, she says, "They never say, 'No, I can't do it.' Never heard them say no in all my years of working with them." It's been almost 10 years that Darlene has worked with TrusteSolutions, and she claims, "I don't think there's any support out there that's better."

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**TAKE CONTROL. WITH CONFIDENCE.**

# Solutions for your professional practice

Darlene appreciates the ability to automate many routine functions so she doesn't have to spend unnecessary time manually researching information. One particular feature of the TrusteSolutions software she values is Research Websites. Local Florida information, real property values, and vehicle information are already there for her. The information is gathered and deciphered so she can use it. "It takes a lot of pressure and stress off the person doing the work," Darlene says.

For Darlene's paperless office, organization of documents is especially important. TrusteSolutions' integration with Outlook allows her to save emails with documents attached so everything is saved together in one place. The information is easy to access, easy to find, and easy to use. There is no need to print a lot of paper.

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She also uses Remote Deposit Capture. She appreciates not having to make copies of checks and send via mail, waiting for them to be received, saving both time and postage cost. She can handle all of her banking from her desk with a scanner. She makes electronic copies of checks and saves them in her cases. She can even set alerts if there is an issue, which she says is another huge time saver for her.

## In Conclusion

Darlene is an extremely busy, yet efficient, trustee assistant supporting two trustee practices and appreciates the cost and time savings offered by TrusteSolutions through technology, automation and responsive support. When asked if she would recommend TrusteSolutions to other trustees, her answer is an overwhelming, "Yes, definitely." TrusteSolutions is proud to support such a dynamic person and office.

## About Darlene Anderson

Darlene Anderson is the Firm Administrator and Director of Trustee Operations at Furr & Cohen, P.A. She will be celebrating 28 years with the firm in June, 2020. Darlene earned a bachelor degree from Youngstown State University in Business Finance with a concentration in Banking. She also served as a member of the NABT Board of Directors for 6 years.

## About TrusteSolutions

TrusteSolutions, a division of Financial Software Solutions, LLC, is a Houston-based software company that provides financial case management software to bankruptcy trustees and insolvency professionals. Our enterprise-level software and infrastructure originated on the web for increased mobility, enhanced reliability and security and greater performance. As an industry leader, clients can rely on our extensive customization framework, mobile applications and social/collaborative platforms to propel their efficiency and productivity so they can TAKE CONTROL. WITH CONFIDENCE. Learn more at [trustesolutions.com](http://trustesolutions.com) or call 866-878-7831.