

Reliable software provider allows trustee to manage what would otherwise be “an unwieldy case load” on his own.

Background

Ken Gordon has been a trustee for 25 years in Rochester, New York. He has used most of the industry’s major case management software platforms throughout his career. More than six years ago, he switched to TrusteSolutions due to a good friend’s recommendation, someone he could trust. He had been experiencing some reliability and responsiveness issues with his current provider that were causing him concern. Ken changed to the TrusteSolutions web-based platform, saying, “It’s been tremendous ever since.”

Situation

Ken was frustrated by his previous case management software provider’s unfulfilled promises, banking that did not happen, erroneous information in his 341 calendar, and being called out in audits, sharing, “They just couldn’t meet my needs.” Enter his former colleague, a huge fan of TrusteSolutions and now located in Arizona. She urged Ken to speak to TrusteSolutions. Ken had some initial reservations due to TrusteSolutions not having a substantial presence in upstate New York. He knew he would have to explain the customized forms he would need. He was looking for someone that would be with him for the long haul, and not an upstart, so that eliminated some other options for him.

Ken made the move to TrusteSolutions and quickly found that he “liked a whole lot of things better.”

Solution

“First, and this is both for software and personnel, reliability is extraordinarily important to me. The way the data is processed in the system needs to come through in an accurate way. If I can’t rely on it, it’s no good to me.” With TrusteSolutions, Ken found the reliability and data accuracy he was looking for.

Ken has a number of things he likes about the TrusteSolutions software, including:

1. It’s intuitive. He can easily find where things are located.
2. It’s customizable.
3. It’s user friendly.
4. It’s streamlined and efficient, a good fit for him. “It’s set up how I think and work.”
5. He can create his own queries for TIR reports.
6. The automation of final reports.

There are many more software features that Ken would like to learn to use when he can find the time, knowing they will further streamline his work, saying, “I love the automated features to help me. It’s so much more efficient. I can’t see how people do it manually.”

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Solutions for your professional practice

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Since COVID, Ken began working remotely and no longer has a full-time assistant. TrusteSolutions allowed him to work seamlessly, although he admits he missed his physical files. He soon graduated to digital files and started using features like Remote Deposit Capture for banking, calling it, “quite useful.” He was worried about moving to the electronic case filing system, noting attorneys don’t like change. But he quickly got tired of carting boxes of paper around and multiple briefcases. Although he was slow to give up paper, he knew he had a reliable software provider and started using BlueStylus to move documents digitally, store them, and have other attorneys upload their documents directly into the system. Now Ken can quickly link documents to a case with just a couple of clicks. He says his new habit is to discourage people from giving him paper and instead encourages them to upload documents to BlueStylus. “TrusteSolutions has allowed me to work independently and more digitally. I wouldn’t be a trustee without a reliable software system.”

Ken also enjoys the mobility of the software because it is cloud-based. He can use it when traveling out of town, at home, or on vacation. Wherever there is internet access, he is good to go. He also likes the peace of mind he gets knowing his TrusteSolutions data is continually backed up in the cloud. He doesn’t have to do it manually, giving him one less thing to be concerned with. Ken has never experienced any downtime with TrusteSolutions.

In addition to the mobility and reliability of the software, Ken appreciates the support he gets from his TrusteSolutions representative, everyone in technical support, his trainer, and company leadership, calling them all superstars. He often uses the chat function to reach out with questions.

In Conclusion

Ken is a TrusteSolutions advocate, knowing they can save a trustee both time and money. He’s experienced it firsthand, and he shares his experience with others saying, “The software is reliable and flexible. The people are great to work with and super responsive. You can rely on it to do the job for you and make your life easier. That’s TrusteSolutions.”

From reducing paper and increasing automation, to remote banking and electronic 341 meetings, Ken is finding greater efficiencies with TrusteSolutions each day. “It allows me to manage what would otherwise be an unwieldy case load.”

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About Ken Gordon

Kenneth W. Gordon is a highly recommended bankruptcy and debt attorney practicing in Rochester, New York. Ken also sits on the U.S. Trustee Panel covering the Western District of New York. He is on the Conference Planning Committee for the National Association of Bankruptcy Trustees and has been a member since 1998. Ken received his Bachelor of Arts degree from the State University of New York, Albany and earned his JD Cum Laude – Juris Doctor with Honors from Albany Law School of Union University.

About TrusteSolutions

Long-standing leadership and superior customer ratings are top reasons why TrusteSolutions is the proven choice for cloud-based bankruptcy and receivership case management software. Built in the cloud, TrusteSolutions leads the industry with relentless innovation for streamlined case management. Users enjoy automated docket entry analysis, fully integrated banking, auto-valuation of assets, integrated trustee web pages for secure collaboration and workflow automation for maximum productivity. Backed by outstanding customer support that delivers answers when you need them and system speed like no other, TrusteSolutions, a division of Financial Software Solutions, LLC, a Houston-based enterprise-level software company, empowers attorneys to take control with confidence, saving them time – and money. Learn more at trustesolutions.com or call 866-878-7831.