



A division of Financial Software Solutions

# TRUSTESOLUTIONS CUSTOMER SATISFACTION SURVEY

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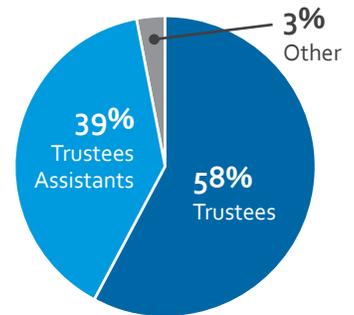
2023

## EXECUTIVE SUMMARY

The annual TrusteSolutions (TES) Customer Satisfaction Survey was open for responses between November 21, 2023, and December 8, 2023. A total of 93 responses were gathered online, with almost 60% of the respondents being United States Trustees and the remaining balance primarily consisting of trustee assistants. The data collected will be used to assist with yearly planning, customer needs assessment, software feature development, and prioritization of initiatives.

Those surveyed primarily included Trustees & Trustee Assistants that are currently TrusteSolutions customers.

### Survey respondents:



## SATISFACTION RUNS HIGH



**100%** of survey respondents are satisfied overall with TrusteSolutions. Of those, **98%** are very or extremely satisfied.



**100%** of those surveyed are satisfied with the TrusteSolutions Customer Support Team and **99%** are very or extremely satisfied.



**99%** of the respondents are satisfied with their Banking Partner.

*"TES continually strives to have the best trustee services/software and makes my job so much easier and less time-consuming because of constant improvements, attention to our needs and often performing tasks for us that saves us so much valuable time as we administer our cases."*



### WE'RE PROUD OF OUR CUSTOMER ENDORSEMENTS

100% of survey participants said they have or would RECOMMEND TrusteSolutions.

*"I have recommended TES to every Trustee I know since 2005 and will continue to do so."*

### FAVORITE FEATURES THAT MAKE LIFE EASIER

Ease of use, responsive and helpful support, and "all the bells and whistles" the software provides were the highest mentions by customers when sharing their favorite TrusteSolutions features.

**HIGHEST  
CUSTOMER  
RETENTION  
RATE IN THE  
INDUSTRY**



MANAGE YOUR CASES. MAKE IT EFFORTLESS. AND PROFITABLE.

## HIGH MARKS FOR SATISFACTION

When asked to rank their overall satisfaction with TrusteSolutions, 100% of customers answering this question said they are satisfied, with 98% sharing they're very or extremely satisfied.

Furthermore, on a scale of 1-5, with 5 being the highest for customer support team satisfaction, almost 90% of TrusteSolutions customers gave the support team a 5 for extreme satisfaction.

When asked about satisfaction with their banking partner, 99% of customer respondents are satisfied and more than 82% are very or extremely satisfied with the service they receive from their banking partner.

*"The support is the absolute best!"*

*"The software is so great! Every action is straightforward, and tracking claims, assets and payments is amazing!"*

*"The immediate and precise response every time there is an issue or a question is so valuable when we are dealing with money. Their customer service is first-rate."*



## VALUABLE BANKING PARTNER RELATIONSHIPS

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When asked for feedback about their banking partner relationships, survey respondents shared favorable remarks about the service received. In fact, statements about banking partner responsiveness and banking partners doing a good or excellent job were mentioned most often. One respondent shared, "They are always very helpful when I have questions." Other customers noted they were impressed with the personalized service from a large banking institution and liked being informed of any issues in real time. The bank's flexibility with fees and interest was appreciated by customers as well.

*"Responsive, accurate,  
excellent customer service."*

# OUR CUSTOMERS ARE OUR ADVOCATES



## Would you recommend TrusteSolutions? 100% said yes!

An overwhelming 100% of survey respondents said “yes” when asked if they would recommend TES.

We certainly appreciate our customers and their endorsements. Thank you for continuing to share your experiences with our software, support, and management team with those you know would benefit from being a TrusteSolutions customer, too. Kristi Singal, President of TrusteSolutions, said, “Our growth in 2023 is in large part due to you and your advocacy. It’s also why we continue to have the highest retention rate in the Chapter 7 case management software industry.”

<i>"I've been on different platforms over the years and TES is by far and away the best."</i>	
<i>"I always do recommend TES and I tell them that after trying the other two large competitors first, I wish someone had helped me choose right the first time. The integrated banking, the stellar customer services, the ease at getting reports, the security of the software, I can (and do) go on..."</i>	
<i>"I would definitely recommend TES. The product is very easy to use, with lots of automation and integrations to help streamline the work and cut down on error."</i>	<i>"TES is the only recommendation I would give and have in the past."</i>
<i>"The system has the ability to make your life easier."</i>	<i>"Once you try TES and it makes your life/work so easy, you'll want to stay forever!"</i>
<i>"TES software is easy to pick up on and with their customer services you will never feel alone."</i>	
<i>"I would tell them customer service is unparalleled. I would also explain that the software is the best I have used. It is intuitive and flexible. I also find that it is easy to do things multiple ways within the software, so you can find a way that works for you."</i>	

# UNLOCK THE FULL POTENTIAL OF YOUR CHAPTER 7 CASES WITH TRUSTESOLUTIONS.

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What can the most advanced case management platform on the market offer your practice? More automation, more customization and more mobility than any other solution, so you can uphold your fiduciary responsibilities with excellence, maintain compliance effortlessly, and maximize profitability.

Built in the cloud and backed by outstanding customer support, TrusteSolutions, a division of Financial Software Solutions, LLC, is a Houston-based enterprise-level software company that empowers attorneys to take control — with confidence.

Find out the difference an advanced platform and  
outstanding customer service make.

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**MAKE THE SWITCH TODAY.**  
**VISIT [WWW.TRUSTESOLUTIONS.COM](http://WWW.TRUSTESOLUTIONS.COM) OR CALL 866-878-7831.**

**MANAGE YOUR CASES. MAKE IT EFFORTLESS. AND PROFITABLE.**