



Introducing Diane S. Carter, a newly appointed trustee in the Eastern District of Texas. She embarked on this new journey in January 2020, adding to her existing responsibilities as a debtor attorney practicing in Plano, Texas.

About TrusteSolutions

TrusteSolutions is a division of Financial Software Solutions, LLC (FSS), a Houston-based software company that has been providing innovative, cloud-based, enterprise-level platforms to legal professionals across the United States for more than 15 years with consistent ownership. In addition to TrusteSolutions, FSS offers online office management software including time and billing, task management and safe document sharing through its BlueStylus division, and a single solution, web-based, case management software designed specifically for receivers through its CORE division, providing collaboration and seamless organization.

Q/A with Diane S. Carter, Trustee

How did you learn about TrusteSolutions and what made them stand apart from the other case management software providers you researched?

“ Carey Ebert, a former Chapter 7 trustee, used TrusteSolutions and recommended it to me as did Chris Moser, a current trustee and TrusteSolutions customer. I looked at a few other options that trustees I knew were using, or had used, but eliminated them because they were not cloud-based and I didn't think they had as good of a home page view as TrusteSolutions.

Being cloud-based made TrusteSolutions more attractive to me, and I thought the sales presentation was good too. ”

Have you found it easy to get up and running on the TrusteSolutions system?

“ As a debtor attorney I have several different software programs and I didn't want another one to deal with; it can be overwhelming. TrusteSolutions just seemed easier to use and I felt like there would be someone there if I needed help and that's been my experience so far. Other trustees that don't use TrusteSolutions said the training provided wouldn't be enough and I'd have to "go it alone." Well, I've found the opposite to be true. I always ask if I have a question and get an immediate answer. They can even do a screen takeover to show me what do. I've had in-person and telephonic trainings and used their web-based learning that's been great too. I definitely feel prepared and have found it very easy to use. ”

What are the benefits of being cloud-based?

“ I didn't want another server in my office space and lose that real estate if I didn't have to. It was attractive to not have another piece of equipment. ”

What particular aspects of the TrusteSolutions platform have you found most beneficial?

“ The secure portal has been great. It eliminates the need for the debtor attorney to email me directly and fill my inbox. Without this software, I don't know how I'd be able to conduct the 341 meetings. They set up a new form for me so I can have a printed form to use for notetaking during the meetings. I'm impressed with how the software is implemented. You can tell TrusteSolutions cares about its customers and the work we do. ”

What advice do you have for new trustees?

“ I would tell them you're not prepared unless you're using TrusteSolutions. They hire good people that know how to use the software—and of course their software, that's what they're good at. I definitely made the right decision. ”

Are you a new trustee that would benefit from an enterprise-level, cloud-based case management software supported by a trusted company? Then give TrusteSolutions a call at **866.878.7831** or email **sales@trustesolutions.com**. Like we did for Diane and Behrooz, we can get you up and running in no time. Be sure to ask about our New Trustee Toolkit.



Presenting Behrooz Vida, one of the Chapter 7 trustees in Fort Worth, Texas. Behrooz received his first trustee case in February, 2020. Thanks to TrusteSolutions, he was set up and ready to go long before this first case assignment.

Q/A with Behrooz Vida, Trustee

How did you learn about TrusteSolutions and what made them stand apart from the other case management software providers you researched?

“Once I was appointed, I called my friends to gather their input. No other providers were recommended. All had changed to TrusteSolutions. In fact, one trustee that was appointed at the same time as me initially picked another vendor. She interviewed every provider in the market. In 3 to 4 months’ time, she switched to TrusteSolutions as well.

I met with TrusteSolutions first. They demonstrated the software to me and exhibited an extreme amount of knowledge about the program. Once I played with it, that confirmed it. It spoke to me. I could easily understand and follow it.”

Have you found it easy to get up and running on the TrusteSolutions system?

“Whenever you’re getting to know a new program it just takes time. Other trustees that use it said it would be intuitive. I have found it really nice and easy to use.

The access to support has been extremely helpful, too. I send an email and get an answer back. That simple. The trainer is fabulous. I could tell he really knew the software and could answer questions about issues a new trustee might face.”

What are the benefits of being cloud-based?

“My firm is in the cloud, and TrusteSolutions being in the cloud too, has been very good for me and my practice.”

What particular aspects of the TrusteSolutions platform have you found most beneficial?

“It is very flexible. Every day I find new bells and whistles. The multiple reports available and the many task updates absolutely help my efficiency. The more I learn about the program, the quicker I can get tasks completed. Previously, I had to look and find documents. Now, I click upload and compare information and am done in about 20 seconds.”

What advice do you have for new trustees?

“Make sure you have someone who can answer questions about the software when you’re getting started. I definitely recommend TrusteSolutions. My assistant likes it too, specifically the flexibility and options it provides.”

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