

ACCOLADES FROM NEW TRUSTEES



An Interview with April Hulst, Trustee

April Hulst has been a new panel trustee in Grand Rapids, Michigan, for a little over a year now. She was appointed around the same time as two other local trustees. Wanting to be on the same case management platform, together they reviewed case management software options and unanimously chose TrusteSolutions. They all like how easy it is to use and the excellent customer support they receive.

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"They have been like a mentor to me as I'm still learning."

How did you learn about TrusteSolutions and what made it stand apart from the other case management software platforms?

A: I wanted to use the same software platform as the others in my area were using. Many were using TrusteSolutions and were quite happy with it. Along with Greg Ekdahl and Allison Greenlee, also newly appointed trustees at the time, we researched a couple of industry software solutions. We liked TrusteSolutions because we found it very user friendly, access is really straightforward, and the Financial Software Solutions staff is easy to get in touch with.

I also like having the mobile capability through the app on my phone.

How did Financial Software Solutions help you get up and running on the TrusteSolutions platform?

A: It was a very fast process. They came to our office in Grand Rapids. We had a training session and then they set up all of my notifications. Any questions I had, the customer support staff helped me with. They've been a huge help.

What is your favorite feature or tool in the software?

A: I like the 341 Online Review in the software. I use that the most. All my notes and documents are right there. Everything I need to run and administer the 341 meeting is available and it's constantly updating as new documents are uploaded. All of my necessary notes to ask questions are accessible and I can go through them after the hearing dates as well. I can do everything in the system and can even file with the courts from there, too.

I also like the asset summary you can access in the system, the case lists, and common schedule report. I will usually print a Word summary to review. It makes it so much faster for me and shows all of the exemptions so I can quickly and easily spot any issues. For weekly hearings, these are the reports I count on. Now that I am getting some asset cases, I am starting to use the Bank Statement Extraction tool. It saves me considerable time reviewing bank statements. I'm going to look into the Automated Asset Report feature as well. It sounds like it could be very helpful in locating hidden assets.

What do you like most about the TIR process?

A: The proactive nature of the customer support staff. They will reach out to us when we have a TIR with the UST coming up. They print reports that show open cases, asset cases, and any issues. We review them together using Excel. It's like we're just cleaning everything up. It's very helpful to have someone go through this with me. They assist with TFRs as well. They have been like a mentor to me as I'm still learning.

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Any advice you'd give a newly appointed trustee?

A: *Be patient. You won't be making any money for a while. Don't get too overwhelmed with the number of cases you're assigned. We were lucky. They gave us a part-time docket and that made it a lot easier. I've spoken with some new panel trustees that had 30-40 cases to start! Give yourself time to get acclimated and don't stress too much. Everyone seems really willing to help. It will start to get easier. At first, it took me a day to review all my cases, but it goes a lot faster once you get into it and get familiar.*

Would you recommend the TrusteSolutions platform to another new panel trustee looking for a case management solution?

A: *I would definitely recommend it. I have felt it has been easy to use. A lot of trustees use this software, and they seem really happy with it. The staff is excellent. Always available. That's one of the best things. I've had a great experience.*

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