



# The iTracs<sup>®</sup> Advantage

Leverage our expertise for your firm.

## TRUST ACCOUNT MANAGEMENT SERVICES



### RISK MANAGEMENT = PEACE OF MIND

**iTracs** helps you manage trust-account-related risk through ongoing account reconciliation, account activity monitoring, and daily reporting. Gain the peace of mind that comes from knowing your trust account is secure.



### EXPERT SUPPORT

The **iTracs** platform automates daily account reconciliation and includes transaction monitoring, activity alerts, built-in reporting, and Positive Pay options. Professional account managers provide valuable customer support and assistance, lead product implementation, and deliver training. Courteous, knowledgeable, and responsive, they serve as partners in analyzing and managing your trust account.



### VALUE-ADDED SERVICES

**iTracs** services don't stop with the software. Account clean-up, audit preparation, consulting, and other services are available.



### CUSTOMIZED SOLUTIONS

We don't believe in "one size fits all." We listen first. Then we develop customized, innovative solutions that meet your ongoing business needs.



### TOOLS

Several tools, including Positive Pay options, provide maximum visibility into your trust account activity and alert you to possible fraud in time for you to act.



### CLIENT ONBOARDING

**iTracs** client onboarding and user training are second to none. Training plans, including Positive Pay automation training, are customized to meet your needs. Services are implemented quickly and efficiently.



### COMPLIANCE, SIMPLIFIED

Fulfillment of compliance requirements are not easily outsourced – but we can help! **iTracs** reinforces best practices and has built-in protocols that assist you with meeting regulatory compliance requirements.



### ELECTRONIC VERIFICATION OF RECONCILIATION

No need to wait until month end. With **iTracs**, your reconciliation status is confirmed daily from wherever you may be, including from your mobile device!