

## CASE STUDY

# Trust Company of the South

## Leveraging Technology to Provide an Outstanding Client Experience

### A higher level of customization

Founded in 1992 by a small group of families and business owners looking for a more personalized experience than typical large financial institutions, Trust Company of the South has worked with families of all shapes and sizes for over 30 years to build, protect, and preserve wealth. By shifting focus seamlessly from the next ten years to the next 100 via integrated planning and forward-thinking investments, Trust Company's goal is to ensure client legacies for generations to come.

As part of that dedicated service focus, Trust Company relies on advanced technologies to provide an outstanding client experience while driving advisor and staff productivity.

According to Leah Jane Barnwell, Strategic Initiatives Manager, "To deliver on our personalized service promise, we are always looking for the best technologies that can scale with our growth."

Trust Company of the South has been a pioneering user of Black Diamond Trust Solutions for its core accounting and reporting needs for over two decades. To supplement its growth, the firm was seeking comprehensive, integrated CRM and performance reporting tools to provide broader investment and wealth management services.

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— Leah Jane Barnwell  
Strategic Initiatives Manager  
Trust Company of the South

### Profile

**Client:** Trust Company of the South

**Location:** Charlotte, Greensboro, Raleigh, NC

**Description:** UHNW Trust Company and Wealth Manager

**AUM:** \$3.7 billion

**Implementation Year:** 2022

### Background

- Founded in 1992 as a Trust company in North Carolina, the firm serves UHNW families and institutions across the country
- Sought an integrated suite of trust, investment reporting, and client management technologies that could scale with their growth
- Required a comprehensive, customizable CRM solution that could centralize, simplify, and streamline multiple operational processes

The firm ultimately selected Black Diamond's Engage CRM, a highly configurable, advisor-centric CRM platform built on Microsoft Dynamics 365. Engage offered Trust Company a tailored solution to strengthen relationships, streamline operations across business lines, and fully leverage Microsoft's integrated ecosystem.

We knew that the ability to consolidate our technologies under one company would be extremely advantageous," Barnwell notes. "Particularly being able to work with Black Diamond and Engage checked all the boxes for us, most importantly, because of the 'boundless customization' we could access."

One key 'out of the box' feature that Barnwell and her team looked for was the Engage feature called InTouch which would provide alerts to predict client communications and ensure a proactive approach to client service. "We have defined service levels with corresponding client communications, and based on meeting notes, phone calls, and client preferences loaded into Engage, InTouch would automatically remind advisors and staff to reach out to clients for follow-up, which provides us with a proactive, consistent, and reliable service experience."

For Barnwell, one of the biggest wins this year was her initiative to create one central area and process to manage tax returns and payments. "As a trustee, we handle all aspects of taxes and help manage the tax process by coordinating with our clients' CPAs, tracking returns, making estimated payments, and more," Barnwell says.

"So, at tax time, it becomes a highly stressful and risky process to stay on top of everything. By creating a central, automated hub in Engage, we now have a beautiful record of transactions and no longer need to rely on spreadsheets and paper. The efficiency gains have been unbelievable, and for the first time in 15 years, staff have been able to work a normal 8-hour day in April."

In the future, Barnwell is looking to integrate a new, cloud-based document management system into Engage.

"This will enable us to have fewer tabs open, fewer places to go, and ultimately to reduce the distance eyes must go to get stuff done. Particularly for our admin and compliance staff, it will be transformational. At a glance, they'll be able to get a line of sight into contribution data, withholding elections, wire transfer confirmations, and more."

To drive further adoption, Barnwell has developed a series of internal training sessions, partnering with the Black Diamond team to bring advisors and staff up to speed on the advanced capabilities available. "The service from our Black Diamond relationship manager has been critical to us, particularly with some of our legacy clients who have more than 20 years of history," Barnwell says. "Having all our core technologies under one roof simplifies so much."

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## Benefits

- + Integrated technologies from Black Diamond offer boundless customization and service, enhancing overall firm capabilities
- + Robust accounting and reporting tools enable comprehensive and forwardthinking investment strategies
- + Automated CRM workflows in Engage enable the firm to consolidate and streamline tax reporting processes, account opening and closing as well as many other processes providing significant efficiencies and time savings
- + InTouch module provides predictive communication alerts that enable proactive, scheduled communications

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To learn more about Trust Company of the South, please visit their website at [trustcompanyofthesouth.com](https://trustcompanyofthesouth.com).

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