

## CASE STUDY

# InvesTrust

## Streamlining Wealth Management Operations with Managed Services

Founded in 1998, InvesTrust prides itself on delivering clients with high-touch service and expertise while managing, preserving, and growing their wealth. Serving the Oklahoma City, OK community, InvesTrust provides clients with peace of mind and stability. Known for protecting client wealth with steadfast professionalism, InvesTrust develops trust through an independent planning process driving long-term client loyalty.

InvesTrust relies on efficient and highly productive back-office processes and infrastructure as part of that service commitment. "For over 20 years, we've been a strong supporter of the Black Diamond's Trust for the key operational aspects of trust accounting, reporting, and trading, as well as serving as a custodian for our third-party money managers," noted Mark Williams, President, CEO and CIO of InvesTrust Wealth Management. "With Black Diamond, we know we have access to a full suite of technologies and service-support models designed to help us better manage and grow our business lines."

Because InvesTrust has multiple business models and a small back-office team, Williams was in search of a managed services offering that could leverage their resources while providing a comprehensive wealth management platform at the same time. "We started with running Black Diamond's Trust Services on our servers; however, we knew that we needed to move to the Cloud, which has paid off in many ways."

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### Profile

**Client:** InvesTrust

**Location:** Oklahoma City, OK

**Description:** Diversified wealth management firm

**AUM:** \$700 million

**Implementation Year:** 2003

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### Background

- Comprehensive financial services institution providing Investment, Trust, Consulting, and Retirement Plan services
- Sought a managed services and cloud-based platform to leverage operational team
- Needed a comprehensive yet flexible platform and service offering to scale and grow with their needs

Steve Replogle, Director of Trust Services, appreciates the high level of service that Black Diamond provides via the Managed Services team. "They've always been very responsive to our needs, and we've been extremely pleased with the results," he notes. Williams agrees. "They've been a tremendous help to us, expanding their service offering as we've gone through the implementation process."

According to Debbie Sinard, Director of Trust Operations for InvesTrust, she looks at Black Diamond's Trust Managed Services as an 'FTE substitute.' "For example, we had two dedicated people in the office posting transactions. Now, we have reduced that to just one part-time person driving the process by relying on the Managed Services team and outsourcing to them with high confidence. They maximize our day-to-day efforts."

"Clients like the look and feel of the Black Diamond reports, and our ability to publish them directly in their client portal saves us time and costs in not having to mail them physically. They have daily access through the Black Diamond portal and can see in real-time how we manage their assets and performance, which is a fantastic service level to provide."

Moving forward, Williams and the team at InvesTrust are actively examining what role technology will play in the evolution of the wealth management industry. "We are interested in what new technologies, such as AI, will have on the business, with a focus on how regulators will view these new capabilities." In the meantime, Williams agrees that having strong technology partners, such as Black Diamond, will be critical to the success of InvesTrust in the future.

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## Benefits

- + Modern architecture and streamlined capabilities provide high confidence for outsourcing key operational processes
- + Gained a Managed Services offering to deliver a full suite of services and technology
- + Black Diamond integration provided customized reporting, trading, and an innovative client portal

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To learn more about InvesTrust, please visit their website at [investrustwealthmanagement.com](https://investrustwealthmanagement.com).

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## For More Information

SS&C Black Diamond Wealth Solutions offers a forward-thinking full suite of trust technology solutions that are the choice of many of the industry's largest Trust Companies, Wealth Management firms, Retirement Platforms, and Philanthropic organizations. To learn more about how Black Diamond can support your unique business needs, call 1-800-727-0605 or email [info@advent.com](mailto:info@advent.com).