



Arkansas Banking Institution Completes Remote Implementation of Infovisa's MAUI® Trust Accounting Platform

Cornelius, NC May 29, 2020-- Financial technology leader Infovisa® today announced the successful dual implementation of their MAUI trust accounting platform in a total remote approach at a bank in Arkansas this past April 1st. The implementation saw Infovisa perform implementations from two different trust systems to a single database, with the data conversion and training being completed remotely due to COVID travel restrictions. The training was provided to the bank's multiple geographic locations. All pieces of the implementation were completed on the schedule established prior to the breakout of the COVID virus. Amid the limitations and restrictions associated with the current global pandemic, the trust industry's leading service and implementation provider of financial accounting software was the first to seamlessly complete the transition of multiple locations across Arkansas consolidating multiple legacy trust accounting platforms simultaneously.

"The strength of our team and the flexibility of Infovisa's transition plan was put to the test when the pandemic restrictions took hold. The Infovisa team was extremely proactive throughout the entire process" said a representative of the bank. "We have received strong support from the customer support and implementation teams, especially in this business environment. The installation and on-going support have been excellent. What we look for in our strategic relationships is a partnership; we know we have that with Infovisa. The MAUI system is much better at adapting to our needs, rather than making us conform to dated architecture. Whenever we approached them about our vision for the future, the Infovisa team delivered."

"We are excited to be able to continue our growth despite the challenges imposed by the virus," said Mike Dinges, Infovisa's President & CEO. "We have seen organizations prosper and grow by implementing our fully integrated products and services. This bank had outgrown their former trust systems in terms of both functionality and customer service. The tight integration of trust accounting, portfolio management, account review, and performance measurement along with our new client

portal, help bank trust departments focus on winning new business and retain existing clients,” Dinges went on to say.

“Similar to our platform, the new normal for transitioning our strategic client relationships will require real time execution. Our client support model easily allowed us to change gears without a hiccup while two competing trust platforms were decommissioned in a fully remote environment” said Angie Gorman, Vice President of Product Services. “I am proud, but not at all surprised by the performance of our team”

Redefining the Trust Operations Ecosystem

Anchored by its industry leading service and support model, the MAUI trust accounting platform will advance the bank’s goals by providing:

- **True Real-Time Processing.** No waiting for a delayed or overnight batch process. Transaction posting, file maintenance and warnings occur instantly delivering synergy between operations and their investment management process.
- **Built-in Workflows.** Provide efficiency and control with transaction tracking, approvals, notifications, auto-assignment enabling the bank to reduce risk exposure, improve operating performance and deliver scalability into their practice.
- **Seamless Integration.** The ecosystem is built to house trust accounting, modeling and investment management, performance, document management, account review and risk management, work flows, IRA distributions, statements and the digital client experience suite in a single sign on environment, all under one roof while third party provider friendly with its suite of partners and API availability.
- **Innovative Client Portal.** The recently re-designed Infovisa Client Portal uses state-of-the-art technology, enabling the bank to deliver a highly customizable digital client experience so their clients can access their account data wherever, whenever, and on whatever device that fits their lifestyle.



About Infovisa

Infovisa is a leading provider of financial technology solutions delivered to forward-thinking trust, wealth management, and retirement professionals with over 160 clients on its MAUI trust and wealth management platform. Infovisa's solutions deliver a highly scalable operations model empowering its clients to acquire new customers, establish and manage investment portfolios efficiently, provides cutting edge statement reporting capabilities and emphasizes the digital client experience. To learn more, visit www.infovisa.com or follow us on [LinkedIn](#)