2018 Trustmont National Conference

Anthony Hladek
President

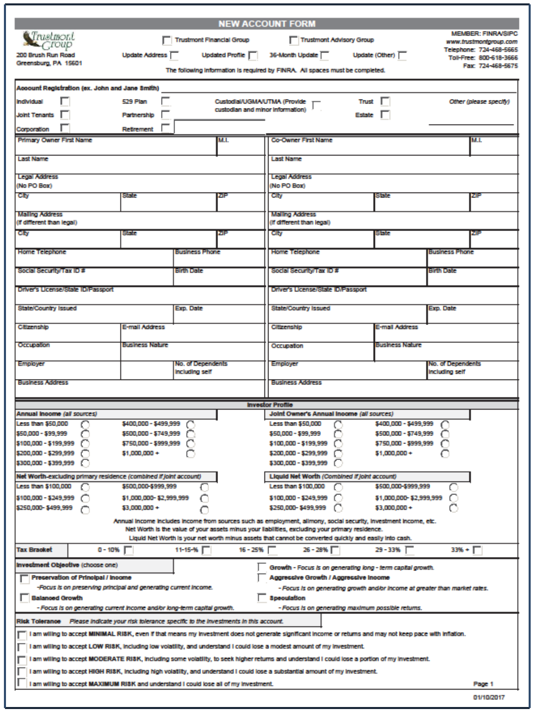
Aimee Toth
Chief Compliance Officer

Trustmont Group

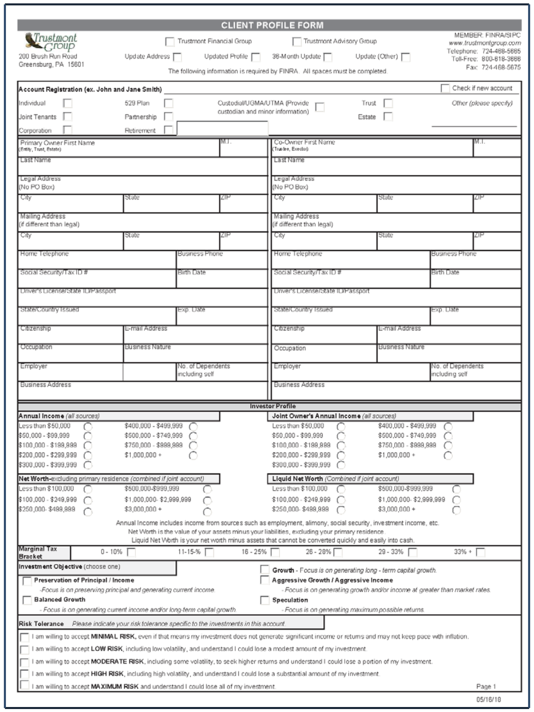
Managed Account Platform

NAF IS NOW CPF

NEW ACCOUNT FORM



CLIENT PROFILE FORM



Annual Mailings

October
31
2018

Annual Questionnaire

November
15
2018

New Financial Advisory Agreements

DESTROY all old FAAs. They will no longer be accepted.

(The new FAA can be found on the Trustmont website)

FundKeeper

Interfaces with Portfolio Pathway and Jaccomo

(still in production)

Text Messaging

Business related
TEXT messaging
requires

ARCHIVE

and

REVIEW

Performance Reporting

Portfolio Pathway

Available here for your needs and inquiries


Q&A

A VERY SPECIAL

Thank You!

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