

Case Study: Scaling Client Service Without Compromise



Client Snapshot: Pinion Delaware Individual Trustee Services

Pinion Individual Trustee Services is a Delaware-based professional individual trustee and affiliate of Santora CPA Group. Pinion delivers a **personalized, high-touch service model** to families with unique and complex trust needs.



Theresa Hughes CTFA, AEP;
Independent Delaware Trustee



Tara Bolinski CTFA, AEP;
Senior Trust Administrator



Challenge

Pinion's old systems did not provide the operational leverage needed to support a growing client base.

- Spending many hours configuring a **system that didn't meet their needs**
- Relying on **paper audit trails** for compliance
- **Inefficient coordination** & handoffs between teams



Solution

Pinion partnered with ProTrustee to streamline and scale trust administration, allowing the team to focus on their clients.

- **Workflows** tailored to Pinion's fiduciary processes
- Automated **approval chains** & multi-level sign-offs
- Time-stamped, **audit-ready transparency** into daily activities across teams

Impact: Enabling client service excellence



Faster & informed responses to clients

"Once something is in ProTrustee... you can see who reviewed it, who updated it. Within minutes, you get a **clear snapshot of what's going on.**"



Efficient internal collaboration

"I have been doing this for 40 years. I have never had a system that is so **customized, easy to use, forward thinking**...it is so valuable to our team."



Flexibility to scale with client focus

"It's always felt that we've been trying to achieve the same goals [as ProTrustee]... to keep everything **client-focused and efficient.**"

See how ProTrustee can help your team scale without compromising client service. Email sales@protrustee.com to get started!

Watch our webinar with Pinion here: <https://www.youtube.com/watch?v=RWpA-3Mud1g>