



**Trust**  
Trust Company of America

WWW.TRUSTAMERICA.COM

## *Hear perspectives of the nation's fastest growing RIAs.*

*Their success was achieved by utilizing technology in a smarter, more efficient way to minimize workflows and maximize productivity, ultimately spending more time doing what they want to do – working with clients and evolving their practice.*

### **“EVOLVE your practice, I DID”**

**WEATHERSTONE  
CAPITAL MANAGEMENT:  
633% GROWTH IN THE  
LAST THREE YEARS,  
\$850M AUM**

**HORIZON INVESTMENTS:  
1000% GROWTH IN THE  
LAST THREE YEARS,  
\$3.2B AUM**

**WEALTHNETIC:  
90% GROWTH IN THE  
LAST THREE YEARS,  
\$950M AUM**

Read these and other RIA growth stories  
now @ [www.trustamerica.com/ria](http://www.trustamerica.com/ria)

#### **ATTRACTING NEW BUSINESS**

*“When I’m talking to wirehouse brokers that are looking for a place to go...this is a solution that is very cost effective, absolutely great technology.”*

-Robert Spicer  
First Financial Equity Corporation, \$1.5B AUM

*“Trust Company of America is very scalable and allows us to bring on a lot of new relationships; a lot of new money management programs with no need to add staff.”*

-Sue Summers  
Purcell Advisory Services, LLC, \$173M AUM

#### **SAVING TIME AND MONEY**

*“By moving to Trust Company of America, we solved our administrative problems.”*

-Ben Scellick  
Ludeman Capital Management, \$65M AUM

*“We can trade every one of our accounts, rebalance them back to target within minutes. The Trust platform really does impact our bottom line. At first I didn’t see how any custodian could really do that, but Trust does.”*

-Victor Ruiz  
Elliott Cove Capital Management, \$75M AUM

#### FREE UP TIME FOR OTHER PRIORITIES

- The Trust Method's innovative platform lets you aggregate multiple trades into a single transaction.

**ATTRACT NEW BUSINESS** - The Trust Method allows you to create custom investment strategies based on modeling technology; giving you the ability to scale your practice and appeal to different clients

#### STREAMLINE OPERATIONAL COSTS

- The Trust Method performs all account rebalancing and block trading on a single, efficient, unified platform

**MINIMIZE RISK** - The Trust Method's quick processing lets you execute trades based on real-time information, reduce reconciliation errors, and eliminate overdrafts.

**BRAND MARKETING** - Private label investor technology, no retail business or conflicts of interests.

#### DRIVING ECONOMIC BENEFIT TO RIAs

*"[Trust's] level of technological flexibility and sophistication allows us to keep our fees lower than other tactical managers."*

-Michael Ball  
Weatherstone Capital Management, \$850M AUM

*"We work with probably 45 other custodians and nobody's capability is as robust as Trust's."*

-Renee Toth  
Flexible Plan Investments, \$860M AUM

*"We feel like we have evolved with Trust Company of America very much hand-in-hand over the years."*

-Gordy Wegwart  
Verity Investments, Inc., \$278M AUM

*"Everyone else is still trying to solve the problems that Trust solved for me 10 years ago: It's that cutting edge."*

-Robbie Cannon  
Horizon Investments, \$3.2B AUM

## About Trust

Trust Company of America offers the ultimate combination of technology, custody, and service for RIAs. The Trust Method increases your top line, improves your bottom line, and optimizes investment management. Trust Company of America believes that portfolio management should be simple - giving RIAs the freedom to spend more time with their clients instead of doing back office administration. The Trust Method is a means of investment management that empowers advisors to automate all parts of their back office within one technology - ultimately giving them the freedom to run their business their way.

*Trust gives you the freedom to run your business your way.*

WWW.TRUSTAMERICA.COM  
800.955.7808

**INNOVATION:** Innovating a technology which is purpose built for RIAs and has been improving for 20 years

**INDEPENDENCE:** Largest Independent RIA Custodian in America

**ASSURANCE:** 150% growth in both AUC and Accounts in 5 years

**CUSTODIAN:** Colorado Chartered Depository trust company, FDIC insured

**TRUST:** Denver, Colorado, 190 Employees, \$11 billion in AUC, 39 Year History