

# ProTrustee Brings Trust Platform to Market Faster and at Lower Cost When Powered by BridgeFT's WealthTech API

## Company Overview

ProTrustee is an innovative, cost-effective and unified trust technology solution for bank trust departments and independent trust companies.

## Executive Summary

ProTrustee is looking to revolutionize the Trust market and capture market share from well-known brands through their customizable cloud-based workflow, accounting, and compliance tools. In order to achieve their go-to market and technology development objectives, they sought a data aggregation partner to provide comprehensive client and account data from a reliable source. ProTrustee partnered with BridgeFT to quickly gain access to the needed data, resulting in a better product experience for ProTrustee clients and an overall more competitive product offering.

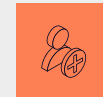
### Results With BridgeFT



ProTrustee is able to offer a more holistic solution for their customers—without having to create an accounting solution internally or work with legacy data vendors.



ProTrustee is able to better compete with more established competitors in the marketplace.



BridgeFT continues to work directly with custodians—ensuring the heavy-lifting of onboarding new advisors is a seamless and effective process.

## Forward-thinking with Best Practices

ProTrustee is an early-stage, growing FinTech startup looking to differentiate themselves in an expanding Trust market filled with legacy providers, outdated technology, and antiquated processes. ProTrustee is looking to revolutionize this market and capture market share from well-known brands through their customizable cloud-based workflow, accounting, and compliance tools.

In order to achieve their go-to market and technology development objectives, they had a foundational need to power their platform with accurate, comprehensive client and account data from a reliable source that offered them a complete view of a client's trust assets held across all of the major custodians. And they needed to accomplish this while controlling costs and weighing a build versus buy decision that would impact their ability to get to market quickly, and challenge their willingness to take on the burden of technology overhead related to traditional data connectivity and ongoing management.

# Bridge

The ProTrustee team began the vetting process with several vendors before eventually discussing a solution with BridgeFT. The issues with the other vendors included high costs, old technology, and a model which didn't mesh well with a modern FinTech looking to launch a new product. ProTrustee Founder and CEO, Brandon Whittington, explained "BridgeFT was the first vendor we looked at that was able to take what other data aggregators are doing, modernize it, and truly take it a step further". BridgeFT was also the first and only API-based provider ProTrustee considered.

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The ProTrustee team was seeking a true partnership in their data aggregator and felt confident they found that in BridgeFT as Brandon explained, "What stood out to us is that BridgeFT is forward-thinking with best practices. We knew we'd be able to grow together."

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Ultimately, ProTrustee chose BridgeFT for a number of reasons. Firstly, the modern, API-first technology made the process simple and gave them a single point of connectivity for all of their custodial data needs. Secondly, the competitive pricing, and BridgeFT's ability to work collaboratively to help them get to market based on their unique business and financial needs. Next, BridgeFT's direct developer-to-developer support gave them a jumpstart on integration and data connectivity prior to onboarding their first client. And perhaps most important, BridgeFT's in-house data expertise brought ProTrustee unparalleled knowledge on working directly with all of the major custodians and ensured the heavy-lifting of onboarding new advisors would be directed by BridgeFT's customer success team.

The two teams then partnered to deploy the integration. During this process, BridgeFT worked hand-in-hand with Brandon's internal team as well as ProTrustee's outsourced development team. "The BridgeFT team is always available for implementation support and to answer any questions we have. They're helpful with everything from breaking down technical jargon to sandboxing and demoing data." The seamless collaboration between organizations demonstrates BridgeFT's commitment to clear communication and swiftly moving projects forward.

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Most importantly, the live integration has made a significant impact on ProTrustee's customers. Brandon explains "our end users can now get the data they need to make informed decisions and complete their day-to-day fiduciary processes. Even better—they can do all this without spending time looking around or working with manual data entry and disconnected providers."

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# Bridge

The launch of BridgeFT's WealthTech API has not only improved the user experience for ProTrustee's current clients, but also opened doors for future growth. Brandon emphasized "now we can compete with more established competitors in the marketplace."

## Single Biggest Win for ProTrustee

**When asked what the single biggest win has been for ProTrustee in working with BridgeFT, Brandon replied, "This partnership has allowed us to offer a more holistic solution for our customers. Rather than having to create an accounting solution internally or having challenges with an older legacy provider, we can do it easier and quicker with BridgeFT."**

Brandon offers his advice to other Founders and CEOs seeking a similar solution. "If you have any needs related to investment data or data aggregation, and are seeking a customized solution, work with BridgeFT. BridgeFT is the type of organization that does a few key things and they do them really well. They know who they are and what they can provide exceptionally well—so you know you'll have a strong partner."

## Reasons Why ProTrustee Picked BridgeFT

### **Modern, API-first technology**

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### **Competitive pricing**

and BridgeFT's ability to work collaboratively to help them get to market based on their unique business and financial needs.

### **Direct developer-to-developer support**

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### **BridgeFT's in-house data expertise**

brought ProTrustee unparalleled knowledge on working directly with all of the major custodians and ensured the heavy-lifting of onboarding new advisors would be directed by BridgeFT's customer success team.

For more information about BridgeFT's  
WealthTech API, contact [sales@bridgeft.com](mailto:sales@bridgeft.com)