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Trumpet, Inc. Integrates with Citrix ShareFile, Simplifying Document Sharing with Clients

Phoenix, AZ, September 11, 2012 –Trumpet, Inc., releases its Publisher tool, enabling advisory firms to automatically publish a directory full of client documents to their respective ShareFile folders, regardless of how the source files are organized.

Trumpet’s Publisher is easy to use, and helps advisory firms provide speedier delivery of documents to their clients. The Trumpet Publisher allows for the easy upload from both a Windows® file structure, or a document management application such as Worldox®. The Trumpet Publisher makes it simple to publish files from any directory, rather than requiring the files to be organized by client folders.

Trumpet’s Publisher also reduces human error. Because clients’ documents are mapped to their respective folders in ShareFile, this helps prevent an employee from uploading a client’s file to the wrong web folder.

“As an early adopter,” states Vilas Naralakattu, Technology Manager for Pinnacle Advisory Group, Inc. in Columbia, Maryland, “I’m very pleased about how well the Trumpet Publisher has performed and how simple it is for our users. It has allowed us to publish over 750 reports into the client’s corresponding ShareFile folders with very few mouse clicks. Without Trumpet’s Publisher, this task would have been burdensome.”

The Trumpet Publisher is the perfect tool for both existing ShareFile users looking for a more automated way of uploading client files, or any advisory firm that is interested in adopting a web portal to share files with their clients and others in a secure and easy manner. Advisory firms increasingly want their websites to be the “information hub” for their clients. As such, Trumpet’s Publisher makes it easy to publish performance reports, custodial statements and other documents for client access, all in one centralized location.

ShareFile is a secure, cloud-based file sharing and storage solution specifically built for businesses. ShareFile allows businesses to send, receive, sync, and store files with anyone, anywhere, using any device. For more information, please visit www.sharefile.com.

About Trumpet Inc.

Trumpet, Inc. is a leading expert in technology and workflow for financial advisors. Trumpet has been providing comprehensive document management and automated document assembly software services to firms since 2002. For more information, visit www.trumpetinc.com or call (480) 961-6003.

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