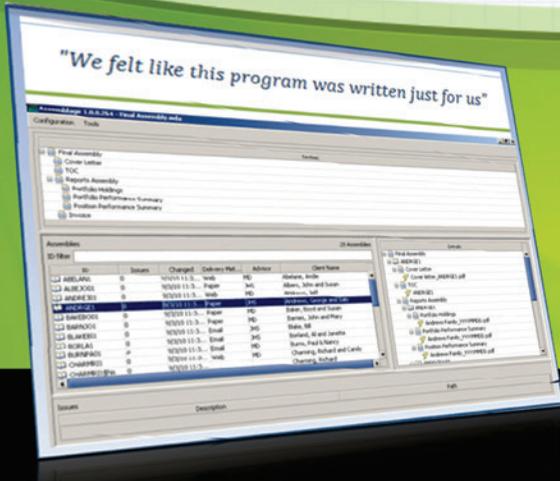




Assemblage™

Document Assembly Software



Spending more time than you should getting reports out to clients?

Automate your reporting process with Assemblage™ !

"It used to take a month to get out reports, now it takes two afternoons." - Aequus Wealth Management, Chicago, IL

Benefits

Dynamic collation of quarterly reports:

Assemblage dynamically collates the contents of your quarterly reports, customizing the content per individual recipient.

Easily identify missing content or errors:

Assemblage identifies any missing content within a specific assembly. This allows you to quickly add/edit/replace documents without having to search for these type of errors.

Proven reliability:

Trumpet Inc. has been providing workflow automation technology to financial advisory firms since 1999, receiving numerous accolades along the way.

Quick ROI:

Assemblage provides a fast return on investment. Realize substantial savings with each use, while the efficiency of automation endures year after year.

Integration with your existing applications:

Assemblage integrates with CRM software, portfolio software and reporting tools, web portals, and document management systems. From one screen, Assemblage provides an easy to understand workspace from which to collate, review, deliver and file your assembled content.

Software Features

Match Relationships

- Automated document collation using relationship "mapping"
- Able to accommodate the most complex scenarios
- Different reports for different recipients
- Unique Assemblies for clients, trustees, etc.
- Collated electronic review for individual advisors
- Able to accommodate daily, monthly, quarterly and annual assemblies

Professional Appearance

- Page numbers where you want them, continuous or segmented
- Table of contents dynamically generated as you wish
- Bookmarks customized for online posting
- Accommodates both Portrait & Landscape page orientation
- Allows you to customize your logo/stamp within each page or section

Intelligent Integration

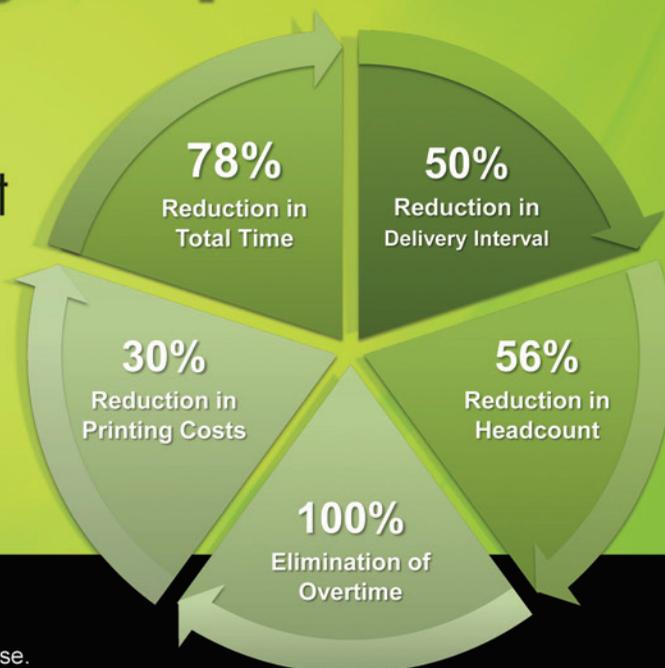
- Easily "splits" Mail Merge content from CRM systems
- Matches content from different applications
- Provides an easy method for generating and previewing reports
- Integrates with portfolio management tools such as PortfolioCenter, Advent Axyx and more
- Exports to various web portals such as ShareFile, AdvisorVault and more
- Quickly archives to document management software such as Worldox

Customize Printing and Stapling Options

- Assemblage allows you to customize which content is printed to which tray within a single print job. This is especially useful for firms wanting to print their cover letter, invoices or other custom content to different paper while printing reports to other paper.
- Assemblage allows you to control your printer's stapling settings, allowing you to staple specific sections, while leaving others unstapled.

The Assemblage™ Experience

Don't just take our word for it, hear what
Assemblage™ users
have to say.



Source:

Data collected from new Assemblage clients after their first quarter's use.

Assemblage Users Say...

Flexibility for Special Case Scenarios

"We typically generate 250+ report packets which consists of Portfolio Center reports, a quarterly letter, and various other reports.

This was a very manual task for our firm because of all of the special circumstances we have to account for and the various programs we had to generate reports from. In the past, it took us several days to manually print and collate all of the reports; this has been reduced to a couple of hours because of Assemblage.

The flexibility of the program and Trumpet's willingness to adapt it to our specific needs has saved us a great deal of time and now quarterly reporting is no big task at all."

- Stearns Financial Services Group,
Greensboro NC

Confidence in Quality

"One final great side product of the software has been its effectiveness in quickly identifying any mistakes in the settings in our other software.

If someone has an incorrect assembly, we are able to go back to our other systems and find our own mistakes and correct them.

This has been a great tool and makes us more confident than ever in the quality of our reporting process."

- Rock Point Advisors,
Burlington VT

Stress Free and Satisfied

"Our new process with Assemblage is a walk in the park, and I'm not exaggerating!

Our financial advisors are surprised to see us smiling at quarter end and are thankful that they get their reports faster and without complaint."

- Mason Investment Advisory Services,
Reston VA



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Contact Us

Call today to schedule a consultation: **480-961-6003**

Or email us at: info@trumpetinc.com

Please visit our web site at: www.trumpetinc.com