



TRUST & WEALTH  
MANAGEMENT  
SYSTEMS

# Press Release

## Lincoln Trust Company Upgrades its Trust and Custody Capabilities with Innovest Systems

**New York, January 5, 2010** – Lincoln Trust Company, a leading trust, recordkeeping and custodial services provider, today announced that it has implemented InnoTrust, Innovest Systems’ trust and wealth management platform. InnoTrust provides Lincoln Trust Company with a cost-efficient and customizable solution to better support the account management and reporting needs of its self-directed individual retirement accounts, as well as 401(k) and custodial accounts.

“We found InnoTrust to be the most innovative and efficient product in the marketplace,” said Helen Cousins, Lincoln Trust Company’s executive vice president and chief information officer. “The InnoTrust platform provides us with a flexible and readily customizable platform designed to accommodate the specialized accounting and reporting needs of our clients. With InnoTrust, we can meet our clients’ current needs and be positioned to grow and change as new market opportunities arise.”

Innovest Systems’ flagship product, InnoTrust, is a browser-based open architecture system that comprehensively addresses the needs of trust companies, banks, private banks, retirement plan administrators and others that need to control, account for, and report on assets held in trust accounts. Because the platform is built on modern-era technology, it is highly configurable and easily customizable to meet client-specific business needs. InnoTrust’s real-time platform requires only a web-browser to run, making it easily deployed and reducing IT time and cost for clients. To ensure that client information is protected and accessible at all times, the platform is designed to be highly secure and backed by Innovest’s excellent disaster recovery capabilities.

“We are very pleased to be partnering with Lincoln Trust Company,” said William Thomas, Innovest’s chief executive officer. “Working closely with Lincoln Trust’s executive leadership afforded Innovest the opportunity to tailor its offering to optimize efficiency and throughput. Because of the flexibility of InnoTrust, we were able to deliver innovative solutions that support Lincoln Trust’s goal of providing efficient, state-of-the-art service to its existing clientele now while simultaneously positioning the firm to grow its product offering in the future.”

### **About Innovest Systems**

Innovest Systems is a financial technology firm that provides technology-driven solutions to trust and wealth management companies. With tens of trillions of dollars worth of assets transferring between generations over the next decades, Innovest’s flagship product, InnoTrust, is designed to deliver a secure, integrated, real-time system offered in an Application Service Provider (ASP) environment. Innovest’s technology is designed to meet the needs of smaller independent trust and wealth management companies, as well as the world’s largest global financial services firms. Innovest is headquartered in the financial district of New York City. For more information about Innovest Systems, visit [www.innovestsystems.com](http://www.innovestsystems.com).

### **About Lincoln Trust Company**

With a heritage in the financial services industry dating back over 50 years, Lincoln Trust is one of the largest independent providers of trust and custodial services in the country. You can count on us to deliver exceptional service, best-of-breed products and the next-generation online support.

Providing an exceptional service experience to each and every client is a hallmark of our business. We achieve this by listening carefully to our clients and gaining a true understanding of their needs. Our professional service teams are knowledgeable in all aspects of self-directed retirement accounts and plans.

Lincoln Trust is regulated by the Colorado Division of Banking. Annual financial audits, including reviews of our internal controls and procedures, are conducted by the accounting firm of Fortner, Bayens, Levkulich and Co., PC. For more information, visit [www.lincolntrustco.com](http://www.lincolntrustco.com).

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