



Public Trust Advisors Partners with Assette

BOSTON, MA, UNITED STATES, April XX, 2024 – [Public Trust Advisors \(Public Trust\)](#) has selected [Assette Software](#) to create, review, and deliver essential content to their clients and prospects. The firm is adopting three modules, [Assette Client Presentations](#), [Assette Pitchbooks](#), and [Assette Factsheets](#). Assette software was selected to replace in-house, manual efforts, as Public Trust continues to drive efficiency by enhancing and automating their content creation process.

“We are excited to implement the Assette system firm-wide; the adoption of Assette will centralize our content creation process and empower internal stakeholders to build effective client-facing presentations, saving time and resources through automation,” said Acacia Scavone, Chief Marketing Officer. “We look forward to partnering with Assette in building upon our current process so that we can continue to deliver exceptional client service to local governments nationwide.”

“Assette software will enable the Public Trust team to turn their investment data into impactful content more efficiently and at scale,” said Thusith Mahanama, CEO Assette. “When firms automate with Assette, they dramatically improve productivity often reducing the time needed for creation, review and delivery by up to 90%.”

In addition to the productivity and scaling benefits of Assette, the Public Trust team will also benefit from the software’s built-in compliance workflow. The automated compliance workflow provides a real-time glimpse of the review process, creates audit trails, and builds a version history of documents and content automatically. This will help the Public Trust team manage and meet record retention requirements by eliminating manual document tracking efforts.

Public Trust is joining the growing number of asset management firms selecting Assette to put their data to work to create up-to-date, accurate, and customized client and sales content. Assette software automates the data enablement, content creation, approval, and delivery of a firms’ sales and client materials using their data platform of choice. Purpose-built for asset management, Assette software makes investment data accessible and easy-to-use, improving productivity for marketing, client service, and sales teams.

About Public Trust

Public Trust Advisors® investment services for the public sector include the management of local government investment pools (LGIP) and separately managed, individual investment accounts (SMA). Public Trust Advisors investment management services include administration (fund accounting, participant accounting, transfer agency, client services, sales, and marketing) and/or investment advisory (portfolio management, credit research, risk management, and portfolio valuation). For more information, visit us at www.publictrustadvisors.com. This press release is for informational purposes only and should not be considered a solicitation of investment advisory services.

About Assette:

Headquartered in Boston, MA, Assette automates the data enablement, content creation, approval and delivery of an asset management firm’s sales and client content using their data platform of choice. From first contact with a prospect to sharing

perspective with long standing clients, firms can create, approve, and deliver sales materials, client reports, investment commentary, portal communications, DDQs and more in Assette software. For more information: www.Assette.com