

Intrust Bank

Client Story





Quick Look

FOUNDED:
1876

AUM:
\$6.2 Billion

CONSOLIDATED BANK ASSETS:
\$8B

SERVICES:
Personal banking, business banking,
wealth management

HEADQUARTERS:
Wichita, KS

PRIMARY CUSTODIAN:
LPL

CLIENT PORTAL:
Wealth Access

CRM:
Salesforce

TRUST ACCOUNTING:
FIS

FINANCIAL PLANNING:
MoneyGuidePro

REBALANCING:
Smartleaf

PERFORMANCE REPORTING:
InvestEdge

Bill Martin, CFA, Chief Investment Officer at INTRUST Bank has been a part of the industry long enough to know that nothing stays the same for long—but due to the COVID-19 pandemic he has witnessed a larger shift in wealth management than even he anticipated this year.

“The willingness to adopt technology, embrace innovation, and connect with clients in meaningful ways has skyrocketed,” Martin said. “Digital engagement matters in a way it never has before.”

The time to embrace digital has been long coming and while traditional banks may have resisted moving too fast toward digital connection, it’s a movement that INTRUST has been working toward for years.

“Wealth Access is the hub for our advisor/client relationships and an extension of how our team interacts with the people we serve.”

Bill Martin

CFA, Chief Investment Officer,
INTRUST Bank

Years ago, an advisor may have had to spend hours entering in data to create a financial plan. Today, INTRUST can automate much of that process—thanks in large part to its partnership with Wealth Access.

“Every time we create a plan, we have an updated balance sheet, so our staff can spend their time in front of clients instead of their computer,” Martin said.

“We can deliver so much more value to our clients when we can work within that type of streamlined structure.”

“The clients who want paper statements and to meet in person have been decreasing for years. As clients become more comfortable with engaging us digitally, it becomes a natural extension of our business,” he said. However, the digital revolution isn’t only about clients. The other side of digitalization is the efficiency it can bring to the advisors who work at INTRUST.

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Another major area of efficiency gain has been INTRUST's integrations between Wealth Access and three other key software partners: Smartleaf, MoneyGuidePro, and Genevity.

“At first, aggregating data was more about alleviating some of the work on our advisors, but then it required more work for our clients. Now, though, we can help them see the benefits. When they input more data into the Wealth Access client portal, that information gets shared with MoneyGuidePro—and we can create more detailed financial plans as a result,” Martin said.

Wealth Access Benefits



Remarkable Insights.

With all your customer information together and organized, powerful stories can emerge. Uncover the kind of clear, consistent, and complete views that let you create the experiences your customers crave and your support staff needs to excel.



Unified Customer Data.

The Wealth Access analytics engine rationalizes and enriches data to help you identify risks and opportunities so you can make right-timed decisions and overcome the systems and silos that hold you back.



Hyper-Personalized Experiences.

Create friction-free, intuitive user journeys—for everyone. Wealth Access makes it easy to deliver a living balance sheet and frame a complete financial picture tailored to each person or company you serve.

Bring better insights to your firm.
Schedule a demo to get started.

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