



## **Trustmark Selects FolioDynamix Wealth Management Advisory Services for New UMA and SMA Programs**

*Leading financial services company to deploy FolioDynamix proposal generation and investment research as part of a unified wealth management program offering*

**NEW YORK, NY – November 21, 2013** – FolioDynamix, a leading provider of web-based technology, content and advisory services for managing the full investment and wealth advisory lifecycle, today announced that Trustmark, ranked as one of the best banks in America by Forbes<sup>1</sup>, has selected FolioDynamix advisory services to provide full research, due diligence and investment manager product strategies for unified managed account (UMA) and separately managed account (SMA) program offerings. In addition, Trustmark will use the FolioDynamix wealth management technology platform for proposal generation. The addition of these technology and advisory services will complement Trustmark’s proprietary product strategies.

“Trustmark has long prided itself on delivering high-quality investment strategies to our clients. Adding FDx Advisors’ deep manager research, selection processes and manager products to our existing strategies further broadens our client offerings,” stated Heath Jordan, Chief Investment Officer for Trustmark Investment Advisors. “We are also very excited to use the FolioDynamix proposal generation technology to deliver fully-integrated, highly-customized client proposals that reflect our combined product offerings.”

“We are proud that such a respected organization as Trustmark has chosen us to be a strategic partner,” said Joseph Mrak, CEO of FolioDynamix. “We see this as a significant example of the value that our recent acquisition of trust advisory expertise from Access Partners, combined with the FolioDynamix technology platform, is bringing to firms in the banking and trust industry. We look forward to helping Trustmark leverage new opportunities to grow its asset base.”

## **About FolioDynamix**

Bringing innovation, insight and agility to the wealth management and investment advisor communities, FolioDynamix offers the most comprehensive web-based technology platform for managing the full wealth advisory lifecycle – including proposal and onboarding, research, model management, portfolio accounting, trade order management, operations, reporting, and performance analytics – across all account types. Unlike other wealth management technology platforms, FDX SingleSight™ is completely developed, hosted and supported by FolioDynamix – eliminating silos and empowering advisors with a single platform to manage all customer accounts. The platform provides registered investment advisors, broker-dealers, banks, custodians and service providers with leading-edge technology to attract and retain top advisors, accelerate client acquisition and gain end-to-end visibility into all assets under management for improved efficiency, better compliance, and enhanced client service. Visit the FolioDynamix website for more information. Follow us on Twitter @foliodx.

## **About Trustmark**

Trustmark Corporation is a diversified financial services company headquartered in Jackson, Mississippi, with approximately \$12 billion in assets and more than 200 locations in Alabama, Florida, Mississippi, Tennessee and Texas. Trustmark provides banking, wealth management and insurance solutions through its subsidiaries, including Trustmark National Bank, Trustmark Investment Advisors, Inc., and Fisher Brown Bottrell Insurance, Inc.

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### **Press Contacts:**

FolioDynamix  
Vickie Nutter  
+1 916-288-6404  
[vickie.nutter@foliodx.com](mailto:vickie.nutter@foliodx.com)

Trustmark  
Melanie Morgan  
+1 601-208-2979  
[mmorgan@trustmark.com](mailto:mmorgan@trustmark.com)