

TRANSITIONING TO THE STN-FIDELITY SOLUTION: TRUST PROFESSIONALS SHARE THEIR EXPERIENCES



Fidelity Investments and the SunGard Transaction Network (STN) announced an exclusive agreement to integrate Fidelity's Registered Investment Advisor Group (Fidelity) platform with the transaction processing capabilities of STN. The STN-Fidelity solution for integrated brokerage and trade automation gives trust institutions, retirement plan administrators, and other intermediaries the power to conduct automated mutual fund trading and settlement, and helps simplify administration, accounting, and reporting — all while achieving straight-through processing.

Transitioning to the STN-Fidelity solution is easy, as Greater Bay Trust Company recently discovered. To see how seamless the transition can be, read their story below.

GREATER BAY TRUST COMPANY

Background

Greater Bay Trust Company is a member of the Greater Bay Bancorp Family, an independent bank holding company in Northern California that forged the concept of Super-Community Banking: the personal attention and service blend of a small-community bank with an exceptionally broad range of business and personal banking services.

The Transition Process

Greater Bay Trust Company was moving from another provider's platform and only anticipated a downtime of one or two days. "We perceived the STN-Fidelity alliance to be top of the market, providing all the products and services we needed," said Krystyna Marciniak, vice president and trust operations manager, Greater Bay Trust Company. "So I expected STN and Fidelity to be well prepared and able to convert in a short time frame. We said we'd commit one additional resource, if needed, but due to the excellent teamwork from STN and Fidelity we accomplished everything in a very short time and didn't need to pull anyone from their daily operations."



Fidelity Registered
Investment Advisor Group



Smart move.®

"I'VE WORKED WITH PROVIDERS TO THE TRUST SPACE FOR 17 YEARS, AND THIS WAS ONE OF THE BEST EXPERIENCES I'VE HAD."

Moving Forward with Efficiency

Greater Bay Trust Company now enjoys automatic reconciliation and easy access to statements and transfers, among many other new features of the STN-Fidelity trading platform.

"The transition team was very knowledgeable and highly trained," said Krystyna. "I've worked with providers to the trust space for 17 years, and this was one of the best experiences I've had. They provided us with excellent communications throughout the entire transition."

TO LEARN MORE ABOUT THE STN-FIDELITY SOLUTION AND TO SIGN UP FOR TRANSITION, CONTACT YOUR FIDELITY OR STN SALES REPRESENTATIVE.

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