#### Trustee Edge™, a Zenith American Solutions Product (edge.zenith-american.com)

# ALLEVIATE YOUR DAY-TO-DAY WORKLOAD WITH TRUSTEE EDGE™





## Examples of information that can be stored on Trustee Edge™:

### **Meeting Information**

- Board Meeting Calendar
- Board Meeting Minutes
- Materials Archive
- Upcoming Meetings
- Reports

## **Financial Information**

- Accrued Financials
- Actuarial Valuations/Reports
- Audited Financial Statements
- Forms 990 and 5500

## **Trust Forms**

- Check Requests
- Expense Reports
- HIPAA Documents
- Application Forms
- Claim Forms
- Disability Form
- Enrollment Forms

Zenith American Solutions' Trustee Edge™ is a secure and reliable web-based portal designed specifically for Trustees. This platform offers on-the-go access to plan documents and other critical Trust Fund information.

With the Trustee Edge<sup>™</sup> portal, you can customize your online storage solution to fit your specific needs while ensuring your Trust Fund's information stays safe and secure. The portal also has unlimited uploading capabilities, making it the ultimate hub for Trustee resources.

Trustee Edge™ is included in our standard administrative fee at no additional cost to our client Trust Funds.

	Meeting information/Archive v Financial Information v Trust Forms v Trust Documents v Communication Materials v Contacts v	
	Welcome to the Zenith American Solutions Alternate Demo Trust website. The information contained on this site is intended only for access by authorized Trustees and Personnel to the trust.	
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	Documents	
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Contact Us Account Reg Terms of Use	jistration & Security	

To log in, visit: <u>edge.zenith-american.com</u> and select "Trustee" as the account type and enter login credentials. Contact your Client Services Management Team for assistance.