

FIELDPOINT PRIVATE LICENSES TOTAL BANK SOLUTIONS SECURITIES-BASED LENDING PLATFORM

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[Total Bank Solutions](#) (TBS), a FinTech firm accelerating the digital transformation of sweep programs, deposit funding and securities-based lending (SBL) technology, today

announced that [Fieldpoint Private](#) has licensed the TBS Loan Management System (LMS). LMS is an automated platform that will allow Fieldpoint to provide enhanced value to its clients, increased profitably and rapidly scale its SBL offering.



"TBS has enabled us to transform our SBL business into a critical part of our growth strategy," said H. Russell Holland III, President and Chief Executive Officer of Fieldpoint's banking unit. "Securities-based lending has long been an essential offering for wealth managers. The TBS platform removes the traditional overhead associated with manual processing and allows us to profitably scale while providing a class-leading solution for our clients. In addition to leveraging the LMS solution, we have used TBS's decades of expertise in the industry to enhance our funding strategy."

The TBS Loan Management System is an end-to-end securities-based lending (SBL) platform that automates the origination, underwriting and monitoring of securities-based lines of credit. The platform connects advisors and banks to offer clients competitively priced security based lines of credit which have become a critical part of liquidity strategies for wealth managers.

"With the TBS Loan Management System we now have everything we need out of the box to offer our wealth clients all the advantages of securities-based lending," said Lisa McDonnell, Director of Sales and Treasury Management for Fieldpoint. "After seeing how easy and scalable the LMS platform made the entire process, we anticipate meaningful growth in both client satisfaction and revenue to the bottom line. The knowledge and service the TBS team has provided at each step of the implementation process has been exceptional."

Based in Greenwich, Connecticut, Fieldpoint Private is a boutique private bank and wealth

advisory firm. Fieldpoint was established in the early days of the financial crisis by former Chairmen and CEOs of some of the most well-known and successful financial and consumer firms in America. Their intent was not to craft a firm that would emulate the large, established institutions, but to serve as an alternative to traditional financial services providers.

“We are excited to partner with a prestigious firm like Fieldpoint and to help extend the exceptional value they provide their clients,” said Brian Tully, Managing Director of Securities Based Lending for Total Bank Solutions. “They exemplify the type of client our platform was designed to benefit. Not only has our loan platform positioned Fieldpoint to profitably compete in the growth trajectory of the SBL market, we’ve also been able to enhance their funding strategy with stable and diversified funding sources on the other side of the balance sheet.”

About Total Bank Solutions (TBS)

Total Bank Solutions (TBS), a privately held technology firm located in Hackensack, NJ, was founded in 2004 to serve the needs of banks and financial intermediaries. The company's offerings include the FDIC Insured Deposit Program (IDP) and Loan Management System (LMS). IDP is designed to provide clients with the benefit of extended FDIC insurance and provide participating banks, a stable, diversified and cost effective source of deposit funding. LMS is an end-to-end securities-based lending and collateral monitoring platform that connects banks with borrowers of affiliated wealth management divisions.

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