

Trident Trust

Pitch Portal User Guide

October 2017

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Initial Steps

Register for an account

- From the homepage (<http://www.tridentpitchportal.com/>) enter your Trident Trust email address and select your office.
- Click the 'register or reset password' button.

You will receive an email with your temporary password, which you can change once you have logged in.

An email is sent to the manager of your office who will need to activate your account before you can log in. When this has been done you will receive an email to say your account is ready.



Pitch Portal Login

email:

office:

password:

Sign In »

To register, or if you have forgotten your password, enter your email above and select your office from the drop-down list. Then click on the 'register or reset' option below.

register or reset password »

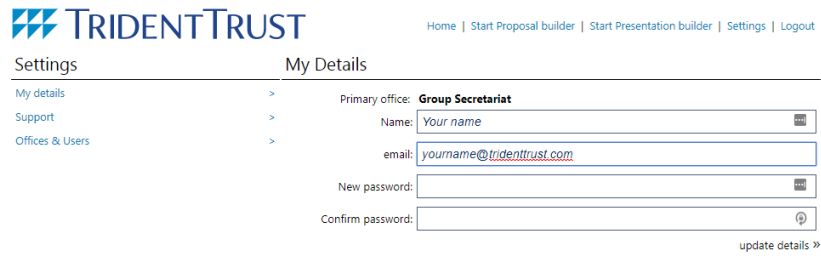
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Log in

- From the homepage enter your Trident Trust email address, select your office and enter your password.
- Click the 'login' button.

Change your password

Click on "Settings" from the main menu to show "My Details" where you can set your name and reset your password.



TRIDENTTRUST Home | Start Proposal builder | Start Presentation builder | Settings | Logout

Settings My Details

My details > Primary office: **Group Secretariat**

Support > Name:

Offices & Users > email:

New password:

Confirm password:

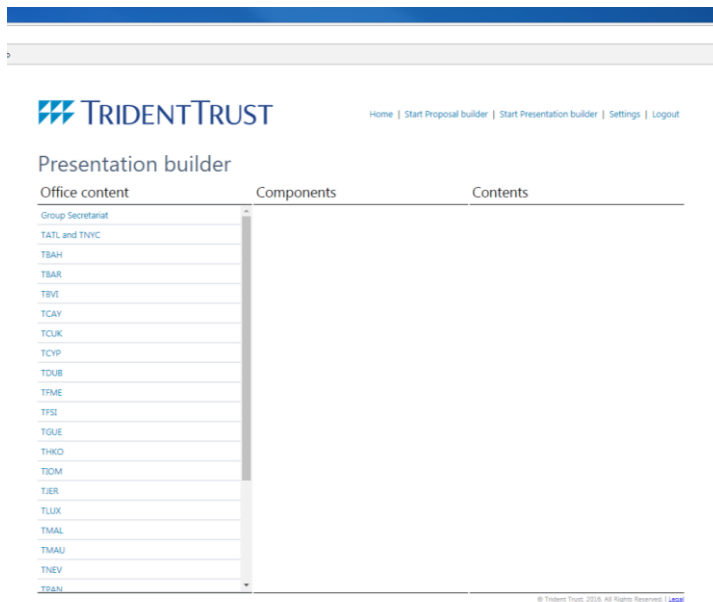
update details »

Type your new password into the “New password” and “Confirm password” boxes and click “update details.

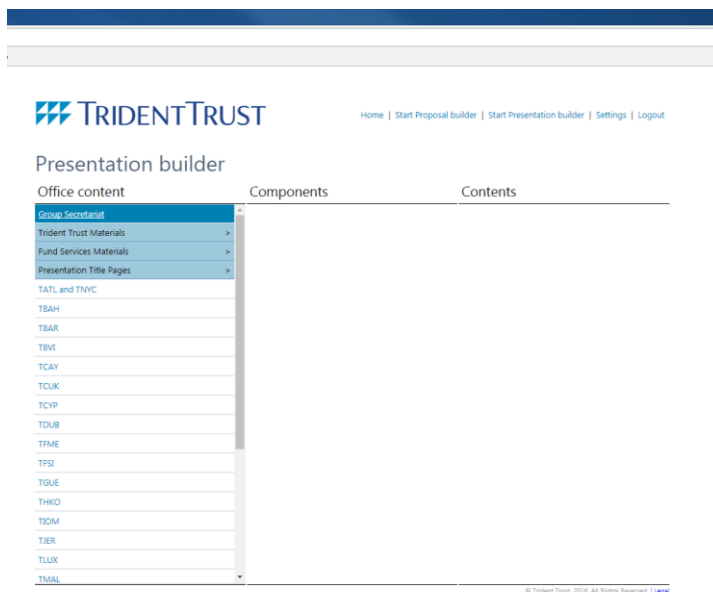
Once logged in you can start to build presentations and proposals.

Build a Presentation

From the menu click Start Presentation builder. In the left hand column you will see a list of offices whose documents you have been granted access to. Users are given default access to the Group Secretariat folder and also to the folder for the office in which they are based. Access to other folders is granted on a request basis.



Select an office to load the root level of folders.



Click on a folder to display the available components.



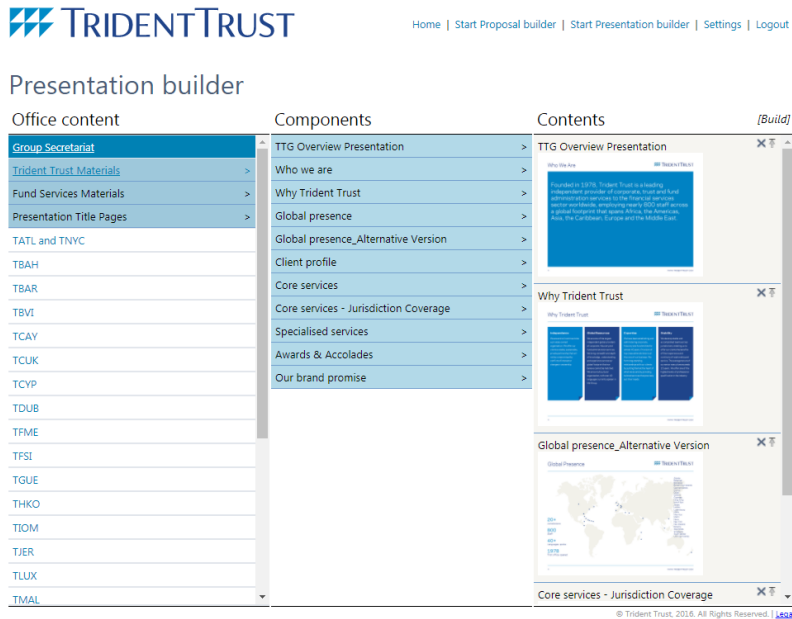
The screenshot shows the Trident Trust logo and navigation links (Home, Start Proposal builder, Start Presentation builder, Settings, Logout). Below the header is the 'Presentation builder' section with three columns: 'Office content', 'Components', and 'Contents'. The 'Office content' column lists various folders like 'Group Secretariat', 'Trident Trust Materials', 'Fund Services Materials', etc. The 'Components' column lists items such as 'TTG Overview Presentation', 'Who we are', 'Why Trident Trust', 'Global presence', 'Global presence_Alternative Version', 'Client profile', 'Core services', 'Core services - Jurisdiction Coverage', 'Specialised services', 'Awards & Accolades', and 'Our brand promise'. The 'Contents' column is currently empty.

Click on a component to add it to the contents list that will form your compiled presentation.



This screenshot is similar to the previous one, but now the 'TTG Overview Presentation' component has been added to the 'Contents' column. A small preview window for this component is visible, showing a blue header with the text 'Trident Trust' and 'TTG Overview Presentation'. The 'Build' button is now visible in the top right corner of the 'Contents' column.

You can repeat the process adding as many components as required from a variety of different folders.

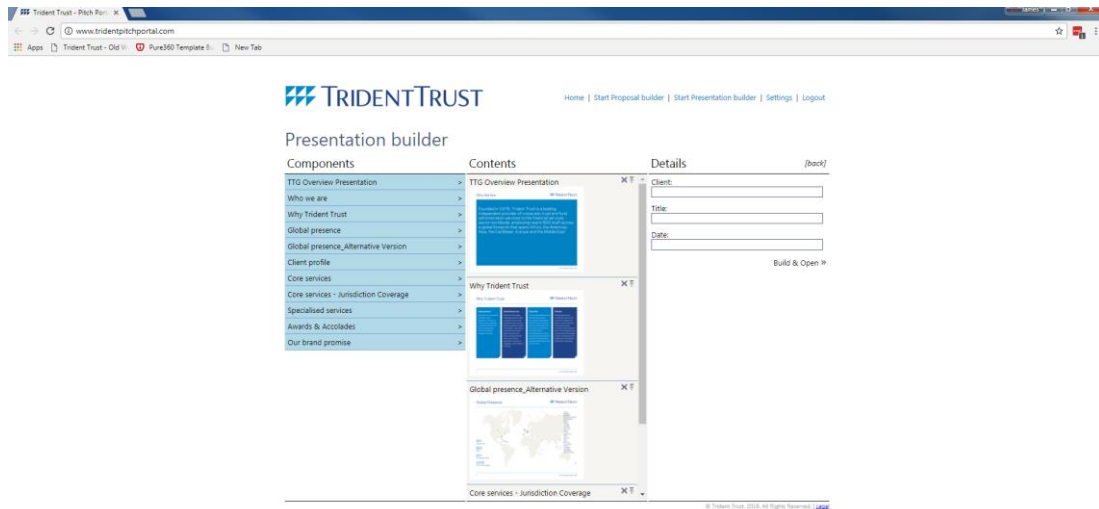


To reorder the components within the presentation click on the item you wish to move and drag it to the position where you want it.

To insert a component at a specific position click on the 'Insert Above' icon  the next component you add will be inserted at that point.

Click on the 'Remove' icon  to delete a component from the list

Once you are happy with your selection and order, click 'Build'. The screen below is displayed.



Set the Client, Title and Date fields, then click 'Build & Open'.

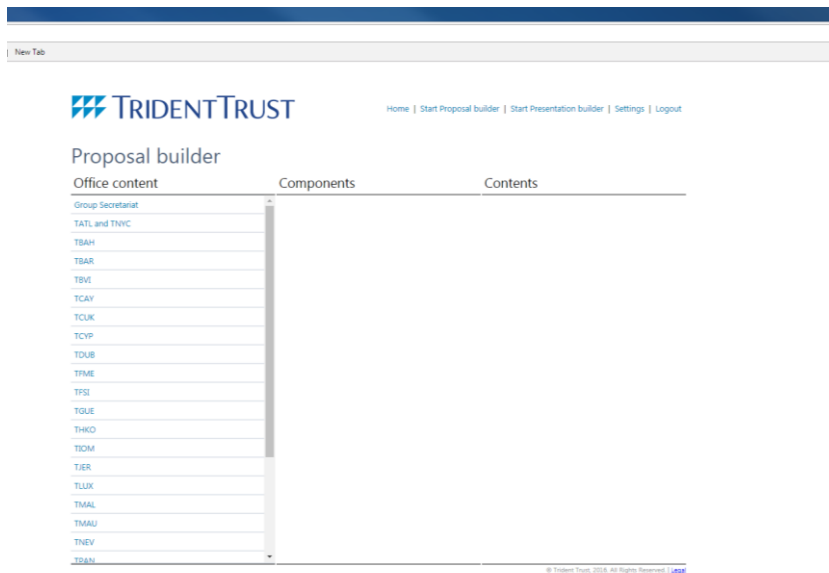
Your document will be compiled and downloaded, depending upon your browser it will either automatically try to open in Word or PowerPoint or save to your downloads folder. Depending on the number of components this may take several seconds.

Once the download is completed the site returns to the home page.

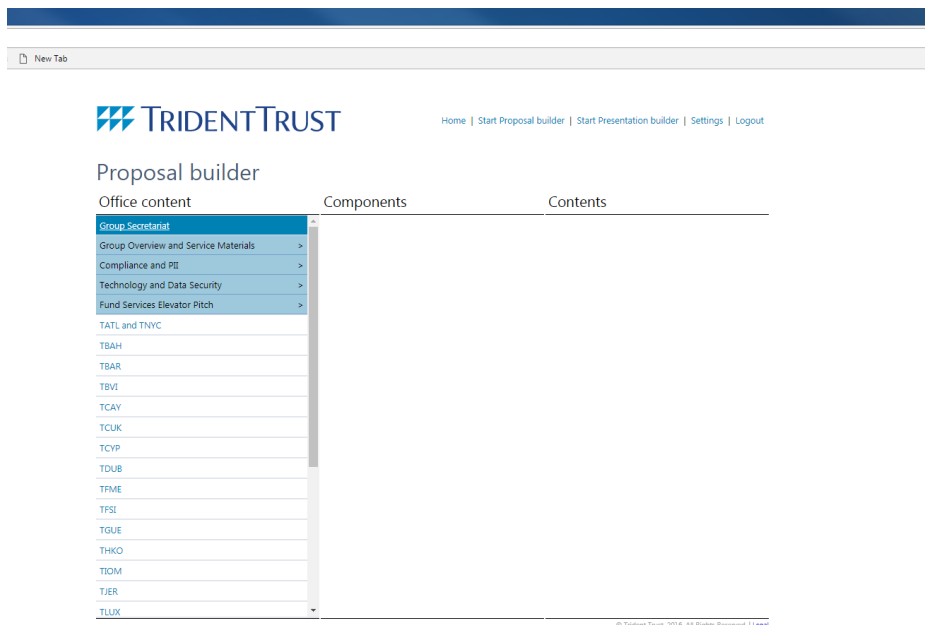
When you open the file, it is opened as read-only. Save the file on your PC and then edit the presentation as required.

Build a Proposal

From the menu click Start Proposal builder. In the left hand column you will see a list of offices whose documents you have been granted access to. Users are given default access to the Group Secretariat folder and also to the folder for the office in which they are based. Access to other folders is granted on a request basis.



Select an office to display the root level of folders.



Click on a folder to display the available components. (In some cases this may display a subfolder, which you can then click to display the components within.)

TRIDENT TRUST Home | Start Proposal builder | Start Presentation builder | Settings | Logout

Proposal builder

Office content	Components	Contents
Group Secretariat	About Trident Trust (Full)	
Group Overview and Service Materials	About Trident Trust (Short)	
Compliance and PII	Trident Trust Global Footprint (funds)	
Technology and Data Security	Trident Trust Global Footprint	
Fund Services Elevator Pitch	Trident Trust Group Services	
TATL and TNVC	Global Corporate Services	
TBAH	Global Wealth Structuring Services	
TBAR	Global Fund Services	
TBVI	Why Trident Trust	
TCAY	Why Trident Trust (for banks)	
TCUK	Why Trident Trust (for funds)	
TCVP	Benefits of Using Trident Trust	
TDUB	Institutional Liaison	
TFME		
TFPSI		
TGLUE		
THKO		
TIOM		
TJER		
TLUX		

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Click on a component to add it to the contents list that will form your compiled proposal.

TRIDENT TRUST Home | Start Proposal builder | Start Presentation builder | Settings | Logout


Proposal builder

Office content	Components	Contents	(Build)
Group Secretariat	About Trident Trust (Full)	About Trident Trust (Full)	X T
Group Overview and Service Materials	About Trident Trust (Short)		
Compliance and PII	Trident Trust Global Footprint (funds)		
Technology and Data Security	Trident Trust Global Footprint		
Fund Services Elevator Pitch	Trident Trust Group Services		
TATL and TNVC	Global Corporate Services		
TBAH	Global Wealth Structuring Services		
TBAR	Global Fund Services		
TBVI	Why Trident Trust		
TCAY	Why Trident Trust (for banks)		
TCUK	Why Trident Trust (for funds)		
TCVP	Benefits of Using Trident Trust		
TDUB	Institutional Liaison		
TFME			
TFPSI			
TGLUE			
THKO			
TIOM			
TJER			
TLUX			

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You can repeat the process adding as many components as required from a variety of different folders.

Tab


Home | Start Proposal builder | Start Presentation builder | Settings | Logout

Proposal builder

Office content	Components	Contents	<i>[Build]</i>
Group Secretariat	About Trident Trust (Full)	About Trident Trust (Full)	✕ 📄
Group Overview and Service Materials >	About Trident Trust (Short)	Trident Trust Global Footprint	✕ 📄
Compliance and PII >	Trident Trust Global Footprint (funds)	Global Corporate Services	✕ 📄
Technology and Data Security >	Trident Trust Global Footprint	Trident Trust Group Services	✕ 📄
Fund Services Elevator Pitch >	Trident Trust Group Services	Why Trident Trust	✕ 📄
TATL and TNYC	Global Corporate Services	Benefits of Using Trident Trust	✕ 📄
TBAH	Global Wealth Structuring Services		
TBAR	Global Fund Services		
TBVI	Why Trident Trust		
TCAY	Why Trident Trust (for banks)		
TCUK	Why Trident Trust (for funds)		
TCYP	Benefits of Using Trident Trust		
TDUB	Institutional Liaison		
TFME			
TFSI			
TGUE			
THKO			
TIOM			
TJER			
TLUX			

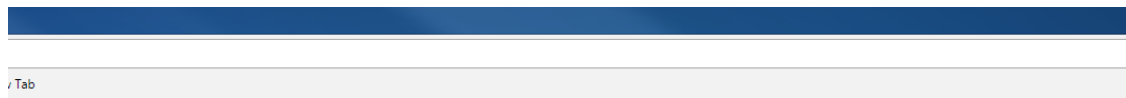
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To reorder the components within the proposal click on the item you wish to move and drag it to the position where you want it.

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Click on the 'Remove' icon  to delete a component from the list.

Once you are happy with your selection and order, click 'Build'. The screen below is displayed.



[Home](#) | [Start Proposal builder](#) | [Start Presentation builder](#) | [Settings](#) | [Logout](#)

Proposal builder

Components	Contents	Details	[back]
About Trident Trust (Full)	> About Trident Trust (Full)	X []	Client: <input type="text"/>
About Trident Trust (Short)	> Trident Trust Global Footprint	X []	
Trident Trust Global Footprint (funds)	> Global Corporate Services	X []	Title: <input type="text"/>
Trident Trust Global Footprint	> Trident Trust Group Services	X []	Date: <input type="text"/>
Trident Trust Group Services	> Why Trident Trust	X []	
Global Corporate Services	> Benefits of Using Trident Trust	X []	Build & Open »
Global Wealth Structuring Services	>		
Global Fund Services	>		
Why Trident Trust	>		
Why Trident Trust (for banks)	>		
Why Trident Trust (for funds)	>		
Benefits of Using Trident Trust	>		
Institutional Liaison	>		

Set the Client, Title and Date fields, then click 'Build & Open'.

Your document will be compiled and downloaded, depending upon your browser it will either automatically try to open in Word or PowerPoint or save to your downloads folder. Depending on the number of components this may take several seconds.

Once the download is completed the site returns to the home page.

When you open the file, it is opened as read-only. Save the file on your PC and then edit the proposal as required.

Offices

The Americas/Caribbean

Bahamas

Trident Corporate Services
(Bahamas) Ltd
T: +1 242 322 6154
bahamas@tridenttrust.com

Barbados

Trident Corporate Services
(Barbados) Ltd
T: +1 246 621 0760
barbados@tridenttrust.com

British Virgin Islands

Trident Trust Company (BVI) Ltd
T: +1 284 494 2434
bvi@tridenttrust.com

Cayman Islands

Trident Trust Company
(Cayman) Ltd
T: +1 345 949 0880
cayman@tridenttrust.com

Nevis

Morning Star Holdings Ltd
T: +1 869 469 1817
nevis@tridenttrust.com

Meridian Trust Company Ltd

T: +1 869 469 1333
nevis@tridenttrust.com

Panama

Trident Trust (Panama) S.A.
T: +507 302 7494
panama@tridenttrust.com

United States

Atlanta
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T: +1 404 233 5275
usa@tridenttrust.com

Miami

Trident Fund Services
T: +1 305 405 9006
miami@tridenttrust.com

New York

Trident Corporate Services, Inc
T: +1 212 840 8280
nyc@tridenttrust.com

Sioux Falls

Trident Trust Company
(South Dakota) Inc
T: +1 605 679 4355
sd@tridenttrust.com

US Virgin Islands

Trident Trust Company (VI) Ltd
T: +1 340 774 7322
usvi@tridenttrust.com

Asia

Hong Kong

Trident Corporate Services (Asia) Ltd
& Trident Trust Company (HK) Ltd
T: +852 2805 2000
hongkong@tridenttrust.com

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nz@tridenttrust.com

Singapore

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Trident Trust Company
(Singapore) Pte Ltd
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EMEA

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seychelles@tridenttrust.com

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switzerland@tridenttrust.com

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T: +44 20 7935 1503
uk@tridenttrust.com

Trident Company

Services (UK) Ltd
T: +44 20 7487 0460
corpservices@tridenttrust.com