

# Real Estate Audit Success Story

with Trinity Real Estate Solutions



KirkpatrickPrice  
Innovation. Integrity. Delivered.

## The Value of Compliance

As a national provider of onsite property assessment solutions, Trinity Real Estate Solutions exists to serve banks, lenders, and financial institutions with the mission to reduce their risks and protect their investments. Trinity's framework is built on key risk mitigation principles encompassing data security, disaster recovery, and IT best practices. Compliance is integral to Trinity's corporate identity, strategic investments, operational environment, and most importantly, customer partnerships.

## Was the SOC 2 Audit Worth It?

Trinity believes you can never be too careful or too secure. Pursing SOC 2 compliance was well worth the effort because it formalized Trinity's already-existing processes while providing tangible assurance for customer partnerships.

Steve Fontaine, Vice President of Services at Trinity, explains, "Because security is at the forefront of our operations, the SOC 2 audit helped standardize and streamline Trinity's policies and procedures, and working with KirkpatrickPrice ensured our customers' data continues to be handled using the strictest of guidelines. We entered this audit fully prepared to hear all forms of feedback, realizing we can always better ourselves and develop more conclusive policies. Protecting our customers' most critical assets is not only our job – it's a commitment that goes to the very heart of our relationship with each and every client. Bottom line – it's the right thing to do."

## Leveraging Compliance as a Competitive Advantage

Today's customers recognize the importance of data security and a service organization's internal controls. While Trinity has always been married to the ideals of data security, the SOC 2 certification demonstrates a formality surrounding the system and processing disciplines to meet and exceed customers' expectations. Because their client base consists of financial service providers operating in a highly regulated environment, Trinity views these requirements as absolutely imperative. Consequently, to Trinity, their commitment to compliance and risk management is much more than just a competitive advantage – it's a necessity.

Recommendation  
Score:



Online Audit  
Manager Score:



1

Streamline Your Audit

2

Partner You with an Expert

3

Deliver a Quality Audit

## Did KirkpatrickPrice Deliver on Their Quality Guarantees?

Trinity believes that KirkpatrickPrice provided the framework to enhance their current data security program and provide efficiencies with clear examples and deadlines. They appreciated the well-managed process with clear lead schedules and identification of responsibilities, which allowed for overall audit efficiency. Fontaine comments on KirkpatrickPrice's quality and says, "As a whole, KirkpatrickPrice provided the needed guidance, knowledge, and expertise to facilitate Trinity through the process logically. Our KirkpatrickPrice auditor continually pushed Trinity to not just meet but exceed our implementation of best practices. Overall, the audit process exceeded our expectations."