VALOR®

Case Study

Modernizing Mineral Management for a Regional Bank Trust Department



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Modernizing Mineral Management for Trust Clients at Scale

At a Glance

Client: Large Regional Bank, Trust Department
Portfolio: Large, Multi-Account Trust Portfolio
Engagement: Multi-Year Strategic Partnership

When Legacy Infrastructure Limits Visibility

Managing mineral assets across a large number of trust accounts requires reliable data, timely reporting, and consistent portfolio oversight. Before partnering with Valor, the bank relied on a legacy accounting platform and a separate asset management tool, creating a fragmented operating environment that made day-to-day administration more difficult.

That fragmentation left the Trust Department reliant on manual workarounds and constrained its ability to scale efficiently.

Trust Officers were often responsible for manually compiling spreadsheets for client requests, while more complex reports could take hours or require overnight processing. At the same time, manual data entry created recurring issues with well API numbers and other key identifiers, making accurate reporting and recordkeeping more difficult.

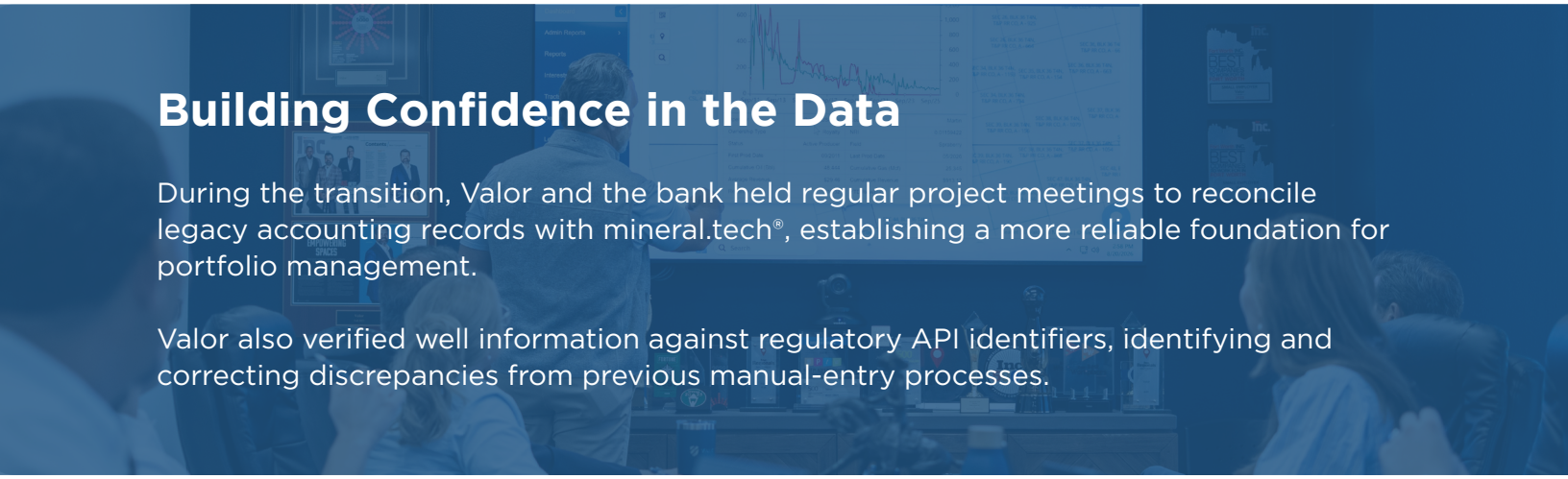


Fragmented systems. Manual processes. Limited visibility.

A More Connected Approach

Valor partnered with the bank to transition its mineral portfolio to mineral.tech®, replacing the previous provider at a lower cost and establishing a more unified foundation for institutional mineral management.

The objective was not simply to replace outdated systems. It was to create a more accessible, scalable, and dependable operating environment for the bank's Trust Department, Property Managers, and clients.



Building Confidence in the Data

During the transition, Valor and the bank held regular project meetings to reconcile legacy accounting records with mineral.tech®, establishing a more reliable foundation for portfolio management.

Valor also verified well information against regulatory API identifiers, identifying and correcting discrepancies from previous manual-entry processes.

Reporting Designed for Institutional Use

Recognizing the bank's fiduciary and client-service needs, Valor developed customized reporting capabilities, including annual review reports and 12-month historical well-level analysis covering gross-to-net revenue, production volumes, pricing, and taxes.

These capabilities provide Trust Officers and Property Managers with more comprehensive, accessible portfolio information to support account reviews, ongoing oversight, and client service.

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From hours to seconds

Through mineral.tech®, Trust Officers, Property Managers, and authorized clients can access standardized reports with multilevel filtering, retrieving information in seconds that previously required hours of manual preparation or overnight processing.

Greater Visibility, Less Manual Work

By bringing mineral asset information into a centralized platform, Valor reduced the bank's reliance on disconnected systems and manual processes. Trust Officers and Property Managers now have more direct access to portfolio data, allowing them to respond to client inquiries more efficiently and devote less time to administrative tasks.

Centralized Portfolio Records

Valor has built thousands of tract records and organized the bank's supplied leases and deeds into a centralized digital system, improving accessibility and supporting ongoing portfolio oversight.

Responsive, Ongoing Support

Valor continues to provide timely support to the bank's Property Managers with system changes, access requests, and administrative needs.

Unified
platform replacing disconnected tools

1,000s
of tract records organized

MFA
protected portal with full audit trails

Built for Institutional Confidence

Valor supports the bank's IT and risk management requirements through annual SOC 1 Type II reporting, quarterly security testing, annual third-party penetration testing, and multi-factor authentication with audit trails.

Supporting Client Relationships and Business Development

As an extension of the bank's Trust Department, Valor helps differentiate its mineral management services. Trust Officers use live mineral.tech® demonstrations during prospective client meetings and trust reviews, strengthening client engagement and supporting long-term relationships.

A Partnership Built for the Long Term

What began as an effort to modernize mineral management has evolved into a lasting strategic partnership. Through integrated technology, specialized expertise, and dedicated support, Valor continues to help the bank strengthen portfolio oversight and deliver more efficient service to its trust clients.

Your Institution. A More Integrated Approach.

Discover how Valor combines specialized expertise and technology to support the evolving needs of banks and trust departments.

Connect with Our Team →

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