

USE CASE

Wealth Management Firm

The firm quickly recognized that moving its entire infrastructure to the cloud was the best way to safeguard it against physical threats while giving employees and clients secure, reliable remote access.

Xantrion Services Used

IT Roadmap

- ✓ Complete Care
- ✓ Disaster Preparedness
- ✓ Secure Cloud
- ✓ Desktop as a Service



See what makes up a cybersecurity roadmap.

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The Challenge

A wealth management firm was increasingly concerned about the risks and inconveniences of maintaining decades of confidential client financial data on site. Although the firm performed regular off-site backups, downloading that data back to new hardware after a fire, earthquake, or other disaster would be both slow and risky. Its unreliable remote access solution also prevented the staff from working efficiently on their frequent travels. Moreover, existing systems couldn't support the online portal the firm wanted to create to allow clients to store, access, and update their own accounts and documents.

The Solution

The firm quickly recognized that moving its entire infrastructure to the cloud was the best way to safeguard it against physical threats while giving employees and clients secure, reliable remote access. After discussing several options, the firm adopted a completely hosted business environment, from server to desktop. Xantrion's Secure Cloud solution hosts all the firm's data and applications. Xantrion's Desktop-as-a-Service solution allows the firm's staff to work anywhere, at any time, using almost any device, including smartphones and tablets as well as desktop and laptop computers. Xantrion's Disaster Preparedness solution protects sensitive data with continual, automated off-site backups that are quick and easy to restore to Xantrion's hosted systems. Xantrion's Complete Care solution provides all IT support and maintenance.

"We're not technical people, so it's a relief to have Xantrion handle all our IT," says the firm's principal and founder. "To our amazement, our applications actually function better in the cloud, because Xantrion's hardware is so much faster than ours."

The Outcome

Today, the firm has no worries that a disaster might interfere with its ability to serve its clients. "I believe our data is now secure, and that gives me a great deal of peace of mind," the principal says.

In addition, the firm's staff now has fast, dependable access to email and other critical data anywhere, at any time, on almost any device. Secure remote access is also allowing the firm to beta test a client portal system from its CRM vendor, with plans to roll it out to clients in the near future.

"On top of everything else, the technical consultant Xantrion assigned to work with us is superb," the principal adds. "I've never met a more unflappable, patient guy. No matter how basic our IT support questions or how many times we asked them, he always answered them calmly and completely."