



CASE STUDY

COMPANY OVERVIEW

Infotrust has a strong record of work within the financial industry, where security and operational efficiency can mean the difference between success and oblivion. This history includes a partnership with a major player that delivers technology solutions, compliance support, and business services to financial advisers, helping them adapt to industry changes and regulatory requirements.

This client's network includes over 1,300 financial advisers and 570 practices, with more than \$100 billion in funds under advice and annual revenues exceeding \$750 million. The company has experienced tremendous growth in recent years, which has demanded an upgrade in business IT capacity and the bolstering of their cyber security posture.

Financial Services Sector Challenges

The financial services industry faces some of the most stringent regulatory oversight of any corporate sector. Financial data is extremely lucrative to sophisticated global hackers and demands the most robust cyber protection.

Specific Challenges Faced by This Client:



Rapid recent growth, achieved through organic means and brand acquisition, which their current MSP was not positioned to support



External security expertise needed to help upskill internal personnel and expand human capabilities



A needed pivot from reactive cyber security protocols to a more proactive approach



Assistance navigating the changing GRC and the broader legislative environment

Business Requirements and Solutions Delivered

The client opted for a package that included full Infotrust Managed Technology services with support from our cyber security arm. Delivered solutions included Huntress MDR/ITDR, MyCISO Assess and Culture Modules, Airlock Digital Application Whitelisting, LastPass Password Management, and Microsoft Modern Workplace applications. Data storage was upgraded using AvePoint Opus Archiving, and internal communications simplified with the installation of Microsoft Teams Calling. This comprehensive suite of solutions has dramatically improved the client's ability to compete and succeed within their sector and already delivered significant business growth.

When selecting a business IT and cyber security partner, the client was looking for a provider that could:

-  Support its business objectives and increasingly complex cyber security requirements
-  Provide comprehensive coverage for current, emerging, and future technology requirements
-  Seamlessly combine business IT needs with the latest cyber security tools and expertise
-  Deliver personal and tailored service based on lasting human relationships and commitment to a shared set of values
-  Scale IT and security operations to handle expected future growth

The Results

This partnership has produced outstanding results within the last 12 months, including growth from 65 to 240 users. We have supported the client through multiple brand acquisitions and launches, while increasing its security posture and connectivity across all devices. We have helped introduce a standardised approach to device procurement and management and facilitated a change in primary customer platform from Salesforce to Dynamics 365.

Other successful initiatives include ongoing environment and device security hardening and a range of process optimisations. We now work closely with the company's CISO, Chief Risk Officer, and Head of IT to drive infrastructure, UX, and resilience. These outcomes have been made possible by the client's choice to partner with a provider that is on the cutting edge of business IT and boasts one of the nation's most accomplished and decorated cyber security teams.