CASE STUDY

# Odlum Brown Achieves 75% Faster Operations and Cloud-Ready Security with Fortinet



Odlum Brown is one of Canada's most trusted independent investment firms, providing integrated wealth management solutions for over 100 years to help clients achieve their financial goals. Its longevity in the investment industry is underscored by careful stewardship, consistent client experiences and a disciplined approach to risk management.

That same discipline shapes how Odlum Brown thinks about technology. In a business where trust is currency, the security and reliability of infrastructure are inseparable from client experience. When Neumann Lim joined as manager of infrastructure and cybersecurity, he brought an urgency to modernize that was grounded in the firm's mission. The goal was not simply to replace hardware; it was to build a secure, integrated, and cloud ready foundation that would let the organization move faster, see more, and enforce policy with precision. "We're a namesake here," Neumann explains. "Our clients expect excellence, and our teams need a network that lets them deliver it."

## Outdated Systems Created Blind Spots and Slowed the Business Down

Odlum Brown's environment had accumulated significant technical debt. The firm relied on multiple legacy firewalls, aging switching infrastructure, and a mix of configurations across branches that made the network difficult to manage and even harder to troubleshoot. Visibility was limited, forcing the team to rely on manual investigation and packet captures to diagnose issues.

At the same time, employees were demanding faster access to applications, especially cloud services, while the firm's costly MPLS connections struggled to keep pace. Basic operational tasks took too long, and the older environment couldn't support the speed, agility, or security the business now required. It became clear the firm needed a consistent, modern architecture that provided real-time visibility, simplified operations, and aligned with its cloud-first direction.

## A Unified Security Fabric Streamlines Operations and Accelerates Performance

Odlum Brown began its modernization by standardizing the entire network on the Fortinet Security Fabric, a strategy that provided consistent protection, centralized visibility, and a cloud ready foundation. By deploying a full secure network from Fortinet, including firewalls, switching, wireless, and SD-WAN, the firm transformed its environment into an integrated architecture capable of supporting rapid growth and more sophisticated security controls.

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"Fortinet has become a true security partner for us. Security is a team sport, and we need partners, like Fortinet, who take it as seriously as we do."

**Neumann Lim**
Manager of Infrastructure & Cybersecurity
Odlum Brown

### Details

**Customer:** Odlum Brown

**Industry:** Financial Services

**Location:** Vancouver, British Columbia, Canada

**Number of Secure SD-WAN Locations:** 7

### Business Impact

- 75% faster troubleshooting and operational efficiency
- Stronger zero-trust posture and end-to-end visibility

### Solutions

- Network Firewall
- Secure LAN
- Secure SD-WAN

## A Modern Firewall Foundation Improves Protection and Operations

Replacing multiple legacy firewalls with FortiGate Next Generation Firewalls (NGFW) gave the firm a unified security foundation that was both intuitive and powerful. The new environment made it much easier for the team to learn, manage, and optimize configurations. Neumann shared that his team could begin working with the devices almost immediately because "it's very easy to train team members, and they start working on the equipment right away."

Automation has become one of the most transformative benefits. Processes that had previously required substantial manual effort, such as updating application rules, were now simplified and accelerated. Neumann reflected on how whitelisting Microsoft Teams once required hours of manual configuration, but with the new platform, "whitelisting something like Microsoft Teams used to take hours, and now it's automatic—click, deploy, and we're done." This shift not only improved efficiency but also reduced the risk of human error inherent in manual workflows.

### Products

- FortiGate Next-Generation Firewall
- FortiAP
- FortiSwitch
- FortiGuard AI-Powered Security Services Enterprise Security Bundle

## Cloud-Ready Connectivity with Azure-Based Virtual FortiGates

To support a cloud-first approach, the team also deployed two virtual FortiGate appliances in Microsoft Azure. These appliances serve as the centralized hub for a redesigned Secure SD-WAN architecture connecting all branches. The new model replaced expensive, inflexible MPLS links with dynamic routing paths that prioritize performance and resiliency.

This change immediately improved the firm's cloud connectivity and gave users more consistent application performance, especially for latency sensitive services. The Azure hub also ensured that security policies remained consistent across all branches while giving the team the flexibility to scale or adapt the architecture as cloud workloads evolve.

## Unified Switching and Wireless Delivers Real-Time Visibility

Standardizing on FortiSwitch and FortiAPs across every location created a consistent access layer that enforced identity aware segmentation and reliable performance. The team immediately saw the value of the cohesive ecosystem, especially in the visibility it delivered.

As soon as switch ports were activated, Fortinet's interface surfaced detailed diagnostics, configuration recommendations, and potential security concerns, all in real time. This was a dramatic improvement over the manual, time consuming troubleshooting required in the legacy environment. Neumann explained that they now "operate at least 75% faster than before," and the network often pinpoints issues "before users even notice." This proactive visibility has become one of the firm's most valuable operational benefits.

## Secure SD-WAN Improves User Experience and Reduces Costs

With SD-WAN integrated directly into FortiGate appliances, Odlum Brown can dynamically route traffic based on application needs, circuit health, and business requirements. This ensures that financial applications, communication tools, and cloud services always receive optimal paths while improving resiliency in the event of disruptions.

The shift away from legacy MPLS connections reduced operational expenses by $170,000 annually while delivering faster, more predictable application performance across all branches. The architecture now supports seamless growth as the firm transitions more workloads to the cloud.

## Enterprise Security Bundle Strengthens Layered Defense

Activating the Enterprise Security Bundle across all firewalls, switches, and wireless access points provided consistent, automated protection across the entire environment. The unified approach consolidated multiple tools into a single ecosystem.

The visibility into vulnerabilities and threats became especially meaningful. Neumann recalled how, during deployment at one branch, the Fortinet system immediately identified a vulnerable device on the network, something the legacy tools could never have surfaced so quickly. The team was able to remediate the issue immediately, reinforcing the value of integrated intelligence that works across all layers of the network.

> "With Fortinet, tasks that once took hours now take minutes. We're operating at least 75% faster than before."
>
> **Neumann Lim**
> Manager of Infrastructure & Cybersecurity
> Odlum Brown

## A Standardized Blueprint Simplifies Deployments and Strengthens Governance

With a consistent stack of FortiGate, FortiSwitch, and FortiAP devices across all branches, Odlum Brown established a repeatable deployment model that simplified support and expansion. This standardization supports the firm's strategy and gives the team the confidence that each new branch can be brought online quickly without compromising on security or performance.

## Building Toward Centralized Operations and Zero-Trust Maturity

With a modernized foundation now in place, Odlum Brown is turning its focus toward deeper automation, stronger identity controls, and expanded cloud security capabilities. The firm plans to adopt FortiManager to centralize configuration, automate policy enforcement, and streamline governance across all branches.
This will enable the operations team to manage the environment more efficiently and with greater consistency.

Network access control (NAC) is a major next step. By integrating NAC capabilities through FortiSwitch and FortiAP, the firm expects to strengthen its zero-trust posture by automating device onboarding and enforcing posture checks at the moment of connection. Neumann anticipates that this next evolution could improve operational speed even further beyond the 75% gains already achieved.

Above all, Odlum Brown values Fortinet as a partner, not just a vendor. Neumann describes security as "a team sport," emphasizing the importance of collaboration in protecting client data and maintaining trust. With a modern, unified architecture and a roadmap for continued evolution, the firm is well positioned to meet emerging threats and support business growth for years to come.



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