

innovative



HALCYON
Financial Technology

reliable

responsive

distinctive

trustworthy

holistic

specialized

Industry
Wealth Advisory
Investment Banking
Private Equity

Areas of Focus
Cybersecurity
Disaster Recovery
Record Retention
Hybrid Cloud Tech
Uptime Improvement

Technology Used
Cloud Exchange
Box Governance
VMware
Hosting.com DR
Cisco Meraki
Duo Security 2FA
Livevault
Microsoft

The Challenge

An independent financial services firm with approximately \$4 billion under advisement had an outdated IT architecture in need of a major overhaul.

- IT infrastructure didn't meet SEC cybersecurity standards and presented security risks
- Unreliable, manual data backup process was prone to data loss
- Poor reliability and excessive downtime threatened core business processes with system instability

The Solution

Dissatisfied with its incumbent IT provider, the firm conducted due diligence to select a new service provider with high integrity and service excellence. In early 2014, the firm selected HalcyonFT for its national coverage, problem-solving approach, and experience helping similar firms adopt hybrid cloud technology.



We have a business partner who understands the financial services industry and helps us address not only our most pressing issues, but also what we should be concerned about. I'm extremely happy with the service provided by the HalcyonFT team."

– Chief Financial Officer



After conducting a detailed needs assessment, HalcyonFT developed a hybrid cloud architecture aligned with the firm's strategic objectives. Over a single year, HalcyonFT migrated to a Meraki environment for firewalls, switches, Wi-Fi and mobile device management in three locations. The team established a new server environment with advanced application-aware firewalls and two-factor authentication for remote access. HalcyonFT also implemented Box Governance to meet SEC and FINRA requirements for record retention, cybersecurity, and content control.

Business Outcomes

HalcyonFT delivered services precisely tailored to the firm's needs, resulting in measurable improvements in business outcomes:

- **Faster Disaster Recovery:** Recovery time fell from days to a single hour, with continuous backups, geographically distributed copies, and seven-year retention
- **Tighter Security:** Two-factor authentication improved network security and reduced the risk of data leakage due to cybersecurity attacks.
- **Greater Reliability and Performance:** Business processes were streamlined by resolving longstanding reliability and performance issues.
- **Reallocated Resources:** No longer consumed with IT problems, executives were able to reallocate their time to focus on core business processes.



In my mind, the Halcyon team is the strongest IT service provider that I've ever had. I believe 100% in the integrity of this team. This is the level of white-glove service that I was looking for. The value and peace of mind brought by HalcyonFT is immeasurable."

– Chief Financial Officer

