



CASE STUDY: Breaking Up is Hard to Do



Integrated Advisors Network (Integrated) is a growing independent registered investment advisor (RIA) network that oversees \$3.4 billion in client assets. Integrated enables financial advisors across the United States to operate their own practices and benefit from the upside of independent ownership, providing technology, operational support and other services that advisors need to grow.

At Issue:

Integrated's technology was not keeping pace with the demands of a growing organization that needs to onboard and transition advisors to its platform seamlessly and quickly. The firm's existing set up limited the providers and applications it was able to offer advisors, which was a deterrent. What's more, Integrated was hamstrung by a long-term contract with its technology provider, which complicated its ability to provide a robust technology platform that was secure and in compliance with regulatory standards.



Improved time to onboard by 67%



Onboarded 30 offices with 140 users in 2 years

"We needed a partner that understood our need for flexible and secure technology that would grow with us over the long-term. Visory has delivered that and so much more."

— Michael Young
President of Integrated Advisors Network

Our Solution

Our team took the time to understand Integrated's business model, growth plan and existing technology before determining that migrating to a hybrid cloud environment would provide the flexibility and security that the growing firm needed, without any long-term service contracts.

A hybrid cloud environment allows firms to work securely via individual machines or virtual desktops. Users provide a single company credential to gain access to all of their Microsoft Office 365 applications and data, virtual desktops and local devices. The hybrid environment can be rolled out in minutes to all users and is typically a cost-effective way for firms to ensure business continuity.

There were three phases leading up to Integrated's migration to a new environment that Visory tailored to meet its needs:

- 📁 Phase One:..... Network assessment and drafting a solution configured to the needs of the firm
- 📁 Phase Two:..... Hybrid environment build, including data replication and testing
- 📁 Phase Three: Final testing and validation

Change Management

Visory gave Integrated the flexibility to transfer to its tailored, hybrid environment on its own terms and timeline. Throughout the transition, the Visory team ensured that there were no disruptions in service or access to key data and software.

Visory built a flexible technology backbone for Integrated, so the firm can now add any number of fintech tools to its secure platform. The team worked to get Integrated its own Microsoft Office 365 license so the firm can have greater control over managing its technology and operations as it expands.

Integrated has onboarded more than 30 different firms in less than two years since its beginning its relationship with Visory – and its network of firms continues to grow. Today, Integrated's technology onboarding and conversion process for new advisors is completed in a third of the time that it would take with others.

Working with Visory

Visory empowers firms of all sizes with technology solutions and service that lead to better business outcomes and more efficient and secure operations. Our suite of private, hosted and hybrid cloud solutions and cybersecurity offerings can scale and be configured to every firm's unique needs.

We treat each client's business as if it were our own, with technology solutions that help firms do better business. Call us at (913) 396-4600 or reach the Visory team at sales@rightsize-solutions.com for a complimentary assessment of your technology environment.

The Visory Way

Visory does not lock its clients into long-term service contracts or similar agreements. We believe that satisfied clients will stay clients.

Chief Technology Officer
Wes Stillman says,

“We are not satisfied until our services provide value that exceeds our clients' investment in us.”



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