



How LastTech Restored Deal Certainty for a \$6B+ Investment Firm

At a glance

Whitehall & Company is a fast-moving investment bank handling \$6B+ in transactions. They turned to LastTech to **unify** their systems, **strengthen compliance, secure workflows**, and give leadership the freedom to focus on closing deals.



We are light-years from where we were because of LastTech. It's great to not have to worry about technology. I know every day when I come in the office, it's going to work. That means I can **focus on my core business, my clients, and getting deals done.**

In my opinion, **partnering with LastTech is a great investment.**

- CEO of Whitehall & Company

Discover how LastTech can help your firm reduce risk and scale confidently.

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646-989-9900

www.last.tech

1350 Avenue of the Americas, FL 2 NY, NY 10019

CHALLENGES

Whitehall was running on multiple disconnected systems—Gmail, Dropbox, Google Docs, Excel, and ad hoc spreadsheets. Team members used a mix of Apple and Microsoft devices, with **no centralized approach** to deal flow, compliance, or security. This fragmented setup created:

- **Inefficiency:** Too many tools, duplicative processes, and wasted time.
- **Risk Exposure:** Gaps in compliance and data security protocols.
- **Scalability Issues:** Difficult to track deals and investor data at the pace the company was growing.
- **Problematic Fixes:** Early attempts at Salesforce and other IT providers didn't stick — either too small (no depth of expertise) or too big (impersonal, treated like a number).

SOLUTIONS

Whitehall partnered with LastTech to streamline its technology strategy and operations. Key Initiatives Implemented:

- **Mapped Deal Flow & File Systems:** Consolidated Gmail/Dropbox/Docs/Excel into a single architecture and standardized collaboration.
- **Implemented a Compliant CRM:** Guided multiple rounds of CRM selection until the right one was found, ensuring adoption and regulatory compliance.
- **Strengthened Security:** Added device protections, secure Wi-Fi policies, and a remote "kill switch" that wiped a lost laptop before data could be accessed.
- **Handled Lifecycle Management:** Procured devices, wiped and securely disposed of old equipment, and ensured no sensitive data was left behind.
- **Optimized Compliance:** Recommended, negotiated, and implemented software for FINRA/SEC reporting and investor tracking at the competitive price.

RESULTS

- 1 **Operational Clarity**
Mapped deal flow, consolidated Dropbox/Gmail/Docs/Excel into a single architecture, and eliminated redundant tools
- 2 **Risk Mitigation**
Deployed enterprise security (kill switch, secure Wi-Fi, device controls), ensured data safety, and standardized secure hardware disposal.
- 3 **Scalable Growth**
Implemented a regulatory-compliant CRM, enabling tracking of a \$6B+ deal pipeline
- 4 **Compliance Optimization**
Kept Whitehall ahead of FINRA rule changes and proactively implemented compliance requirements before they became mandatory.