

Achieving Seamless Transition, Strength and Flexibility through Innovation and Technology



Integrated
ADVISORS NETWORK

AUM:\$3.6B

Total Accounts:.....11,000+

At Integrated Advisors Network, we believe that the advisor-owned registered investment advisor model is the future of financial delivery. So we continue to innovate for our advisors to be industry leaders — but we do this with the utmost respect for their well-being and benefit.

Honesty underpins every aspect of our business and we will not compromise our beliefs. As we hold these values in high regard, we expect the same from our network of advisors. We believe in “service before self” and strive for excellence in everything we do — delighting in every success on our shared mission.



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



Overview

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.

The Visory team took 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 contracts.

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The Solution

- ☀ Hybrid cloud environment
- ☀ Flexible technology backbone for scalable growth

Managed, Phased Approach

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

- ☀ Network assessment and solutioning
- ☀ Hybrid environment build with data replication and testing
- ☀ Final testing and validation

Outcome



No disruption in service or access to key data during transition



Improved time to on board by 67%



Onboarded 30+ offices with 140 users in 2 years

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.