

McClarren Financial Advisors Shifts to Visory for RIA-Tailored IT Solutions and Support



AUM: \$278M

Employees: 9

McClarren Financial Advisors, Inc. is a comprehensive, fee-only personal financial planning firm. We provide guidance in taxes, investments, goal setting, record keeping, insurance and estate planning. We help you set realistic goals, and then provide you with the tools, and coaching, necessary to achieve them. Have questions about working with us or how to get started?

I could not believe how seamless it was to move to Visory. We had several project calls to discuss timelines and delivery, and everything just happened like we discussed. Since then the service levels have been really good too. The biggest reason we moved to Visory was how they totally understood the requirements that we have, especially for compliance. Simply put, I'm a Raving Visory Fan.

Jennifer Anderson
Partner, Chief Financial Officer,
Chief Compliance Officer

Overview

McClarren Financial Advisors, Inc., a State College, PA based registered investment advisory (RIA), faced challenges with their previous IT service provider, prompting a search for a more reliable partner. Dissatisfied with the local provider's worsening customer service and escalating costs, Chief Financial Officer Jennifer Anderson decided to explore alternatives.

At an industry conference, Anderson met with the Visory team and expressed concerns about partnering with an IT company located in a different state. Anderson's fears were quickly laid to rest when she learned that Visory conducts onboarding onsite, and with Visory's remote monitoring processes, most IT activity can be completed remotely.

McClarren Financial Advisors Shifts to Visory for RIA-Tailored IT Solutions and Support



The Solution

- ☀ Full managed IT services
- ☀ SecureWorkPlace®

SecureWorkPlace®

A multi-layered, systematic and comprehensive approach to securing your firm

- ☀ Assessment and recommendations
- ☀ Monthly dashboard summary report
- ☀ Robust monitoring solution
- ☀ Endpoint Detection and Response (EDR)
- ☀ Employee awareness training
- ☀ Ticket board
- ☀ Agents on all workstations, laptops and servers
- ☀ Firewall

Outcome



Impact on Operations

- ☀ Onsite onboarding
- ☀ Secure access even facilitates remote work environment
- ☀ Solved ongoing software access issues
- ☀ Convenient hardware procurement



Tailored cybersecurity solutions

- ☀ Security solution built specifically for the RIA industry
- ☀ Maintain cybersecurity data integrity even in a remote environment
- ☀ Cybersecurity dashboard reporting
- ☀ Systematic cybersecurity training
- ☀ Peace of mind and support during an SEC security audit

“Everyone at Visory works very hard. There will inevitably be issues; but when that happens, I reach out and I get the assistance I need. When I go to conferences and talk to my fellow peers, I tell them there really is no other company like Visory for financial firms like ours.”

Jennifer Anderson
Partner, Chief Financial Office, Chief Compliance Officer