

Nemes Rush Family Wealth Management Thrives with Visory's Comprehensive IT Solutions



AUM:\$1B
Total Accounts:.....2,457
Employees:.....7

Nemes Rush Family Wealth Management delivers wealth management services for a select number of clients, from financial planning and investment management to insurance capabilities and more.

Our team is comprised of advisors with distinguished professional backgrounds, having built their reputations as CPAs, CFPs and attorneys. This rich experience gives us an in-depth understanding of all things financial. Our professional backgrounds and problem-solving ability allow us to proactively collaborate with each client's CPA and estate planning attorney.

We started from scratch, at ground zero. We had no technology, no computers, just an empty office. We stood up our firm on Friday, and Visory came onsite. By the time they were done, we were set up with computers, laptops, desktops, firewall ... we were up and good to go by Saturday afternoon.

Tim Rush
Partner and Co-Founder

Overview

Upon its establishment in 2021, Nemes Rush faced the initial hurdle of setting up offices from scratch, particularly addressing the technology aspect encompassing laptops, desktops, printers, firewalls, and more. Following an extensive vendor search and due diligence, Visory emerged as the optimal choice.

Tim Rush, partner, said, ***“The local firms we considered did not have a lot of experience with RIAs, which was important to us. At the end of the day, we chose Visory. Communication with Visory is excellent. We are never left hanging.”***

Visory swiftly executed the technology setup. The procurement of equipment, installation of software, and addressing all other setup issues were accomplished with precision. The firm's technology was fully operational by Saturday evening, two days ahead of schedule.

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The Solution

- ☀ Full managed IT services
- ☀ Secure WorkPlace®

Secure WorkPlace

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

- ☀ Initial setup complete ahead of schedule
- ☀ In-person onboarding to answer any issues
- ☀ Strong communication and responsive support eliminates downtime
- ☀ Peace of mind: technology is not a concern



Cybersecurity Purpose Built for RIAs

- ☀ Comprehensive solution with dashboard reporting
- ☀ Smooth sailing during recent SEC cybersecurity audit

The stability provided by Visory's end-to-end technology solutions allowed Nemes Rush and Visory to focus on growth. With AUM increasing by \$150 to \$200 million annually, the firm credits Visory for being a reliable partner that eliminates technology concerns.

"Visory is an end-to-end solution from start to finish. And the service is impeccable."

Tim Rush
Partner and Co-Founder