

## EisnerAmper Wealth Management Builds Next Level IT Flexibility With Two River And OS33

Driven to reconsider their IT business continuity options after the impact of Hurricane Sandy in 2012 and a major relocation, EAWM (EisnerAmper Wealth Management) of Iselin, NJ discovered that their technology needs extended well beyond the reach of basic colocation and data backups. With three locations and four separate business units, EAWM needed an IT infrastructure that was not only secure and reliable, but would also offer a level of flexibility and user mobility that they could not achieve with an in-house implementation.



“We needed a very flexible, scalable IT infrastructure that could not only keep up with growth, but manage it cost effectively as well.”

Marc Scudillo  
EAWM Managing Partner

When considered within the contexts of cost and long term effectiveness, they realized, moving to a virtual cloud-based desktop solution made much more sense. In 2013, EAWM management approached Two River Technology Group to help develop and implement a solution that would accommodate their many requirements. After an extensive and deliberate analysis, Two River recommended the OS33 Cloud Desktop platform – a bold transition that proved itself to be powerful, flexible, and a perfect fit for EAWM’s growing and ever changing business requirements.

### Client Overview:

EisnerAmper Wealth Management, LLC, is a registered investment advisor and full-service wealth management services firm specializing in the asset growth and protection needs of high net worth individuals, executives and business owners.

### Key Business Needs:

- Enable greater staff mobility and accessibility of critical client data
- Migrate multisite office IT infrastructure to a more scalable and flexible cloud-based virtual environment
- Expand business continuity options
- Increase advisor productivity
- Compliance on client data

### How Two River Technology Group Succeeds:

- Increased advisor productivity via “one click” application and file access on an integrated hosted and web-based environment
- Full mobile device integration enables staff to securely access company data from any location or mobile platform
- Overhead involved with in-house IT maintenance mostly eliminated, while increasing the scalability and growth potential of user-centric technology infrastructure
- Cloud environment enables secure client data consolidation in fully compliant, high availability remote storage facility
- New OS33 environment offers robust business continuity advantages, delivering reliable service despite weather and other disruptive local conditions

## As The Technology Landscape Evolves, Growth Requires Cutting Edge IT Solutions

EisnerAmper Wealth Management, LLC, is a wealth management group based in New Jersey, focused on four critical business areas: corporate retirement plans, corporate benefits plans, financial and insurance planning for executives, and investment and financial planning for high net worth individuals. Their team of 20 financial professionals and clerical staff operate from three strategically located offices in New York, New Jersey, and Pennsylvania and often find themselves shifting focus quickly with changing economic winds and market pressures.

“In our business,” says Marc Scudillo, EAWM Managing Partner, “each business unit has different growth rates at different times, depending on prevailing economic conditions. We needed a very flexible, scalable IT infrastructure that could not only keep up with growth, but manage it cost effectively as well.”

After Hurricane Sandy in 2012 and an office relocation, EAWM management recognized the need to relocate their core IT operations to a secure offsite facility with strong disaster recovery practices in place, and they began the process of reviewing available data colocation services. None entirely met their needs, each option failing to offer the right mix of security, business continuity and critical data availability to satisfy their discriminating requirements. In addition, EAWM needed more reliable mobile access to data for their advisors, who were often called upon to conduct business with clients at offsite locations.

Approaching Two River Technology Group for an alternative solution, EAWM was recommended a cloud-based virtual desktop solution: The OS33 Cloud Desktop platform. Combining the rock solid reliability of sturdy colocation with the flexible power of a virtual desktop environment, OS33 would provide a 24/7/365 cloud-based IT infrastructure easily able to consolidate their computing operations in a remote data center. Staff could access their favorite applications and most important data from any Internet-connected device via VPN, and both short and long term costs of OS33 would be far lower than that associated with maintaining their own in-house servers.

“In a business such as ours, having reliable and secure access to important client information is a critical need.

I can't imagine not having that available to us – that ease of access to everything, anytime and anywhere – and Two River and OS33 made that possible.”

Marc Scudillo  
EAWM Managing Partner

### Application List

#### Financial / Trading

PortfolioCenter

Salesforce CRM

Laser App

Quickbooks

Investment View

Time Clock

#### Office / Internet

Microsoft Office/Outlook

Internet Explorer

## OS33: The Cloud Platform For Financial Planners Who Find Profit In Change

EAWM began the transition to OS33 in May 2013, completing the final stages two months later. The migration went smoothly, the staff's learning curve easy to navigate with a very minimum of interruption to daily business operations. Today, the firm relies on the OS33 platform on a fully turnkey basis, centralizing their resources across their offices and business units, providing a single networked desktop resource for managing clients, vendors, data custodians and other mission critical assets.

EAWM employees now have the power to work as easily from any remote location as from their own office desk, without sacrificing security, data access or ability to meet their clients' specialized needs onsite. This ease of access, combined with OS33's unmatched mobile capabilities, has provided the firm with a powerful tool in realizing their own strategic goals, as well as those of their many discriminating customers.

For more information about the OS33 Solution, contact:



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