HAMILT:N
Business Technologies

IT SOLUTIONS FOR FINANCIAL PROFESSIONALS:

A Buyer's Guide for Managed Services

IT Solutions for Financial Professionals:
A Buyer's Guide

Finance professionals like you rely on technology as an essential part of your daily operations. Some of the significant challenges you face likely include complying with data and privacy guidelines, maintaining security of data and client records, as well as accessing reliable network and hardware support to name a few. This is all compounded by the rapid pace of advancements in technology and the constant threat of cyber attacks. Keeping up with everything requires a combination of continuous education and staff training, nimble and agile team members to pivot with new advancements and an investment in time and money.

Drawing from our extensive experience providing IT solutions for finance professionals, we have created a guide to help you in your purchasing process. This document elaborates on technology that officers, analysts, advisors and accountants like you need. Additionally, it offers suggestions on what to watch out for and how to keep up with the fast-paced, ever-evolving demand for technology.

When you have the right IT solutions in place, you can provide high-quality client service that ensures data security and improves operational efficiency. This checklist will help your organization identify and implement IT solutions to meet your needs.

Your IT Checklist

Cybersecurity: A comprehensive approach ensures you can protect your organization from a variety of risks. The key components needed are:

☐ **Network Penetration Testing**
Provides information about vulnerable points of access and helps navigate an implementation plan for a more secure network.

☐ **Vulnerability/Security Assessment**
Pinpoints security deficiencies through physical and/or network security assessments.

☐ **Remediation Plan**
Identifies needs and recommends solutions to resolve deficiencies or vulnerabilities.

☐ **Education & Training**
Offers customized and pre-packaged training for financial professionals to learn to recognize, mitigate and respond to security risks.

☐ **Phishing Simulations**
Provides customizable email phishing campaigns designed to enhance employees' understanding and handling of phishing emails.

Managed IT: Ensure you have IT support for computers, networks and servers, including planning, repair, upgrades and general technical support for PCs, computers and other devices. Here is a comprehensive list of the systems and tools financial institutions need.

☐ **IT Help Desk Support**
24/7/365 technical support for resolving IT-related issues and ensuring smooth operations.

☐ **Cloud Services**
Secure and scalable cloud storage solutions for data storage and management.

☐ **Network Maintenance & Monitoring**
Ensures your network is maintained and monitored for optimal performance and security.

☐ **Network Security Services**
Implements strong security measures to protect the network from threats and vulnerabilities.

☐ **Data Backup and Recovery**
Establishes a robust backup and disaster recovery plan to protect against data loss and ensure quick recovery.

☐ **Integrated Communications Systems**
  ☐ **Hosted Phones:** Provides hosted VoIP solutions for efficient communication.
  ☐ **VoIP Service:** Offers VoIP services for cost-effective and reliable communication.
  ☐ **Mobile Device Management (MDM):** Manages and secures mobile devices used within your organization.
  ☐ **Alert Notifications**

☐ **Vendor and Third-Party Management**
Manages relationships with vendors and third-party service providers to facilitate seamless integration and support.

☐ **IT Auditing and Compliance**
Ensures compliance with regulations and conducts regular IT audits to maintain security and efficiency.

☐ **Software Updates and Patch Management**
Updates and installs software patches regularly to protect against vulnerabilities to achieve optimal performance.

☐ **Secure Access**
Biometric secured access ensures only authorized individuals are granted access to secured areas.

☐ **Security Cameras**
Offers real-time visual monitoring and recording of facilities and grounds.

How to find a Managed Service Provider

It can be hard to know which Managed Service Provider (MSP) can handle all your needs, and it's important to find a partner you trust that can handle it all for you.

Some qualities that rank highest on the list for choosing a dependable MSP include the following:

Years in Business: Look for a stable provider with many years of experience and service.

Location: MSPs can be located across the country or even overseas. It is important to have an IT partner that is local to you but can provide statewide or national coverage.

References: A reliable MSP will submit a wide array of customer references ranging from small businesses to large corporations.

Flexibility: Find an MSP with more than a one-size-fits-all approach to IT. Your organization is unique and needs tailored IT solutions to meet your needs.

Professional Expertise: Ensure the technicians and support team have experience with organizations like yours.

Questions to Ask: Be prepared when meeting with the MSP to ask the tough questions:

- How will the MSP share findings and data with you?
- What type of reporting is available?
- How are they protecting and monitoring vulnerabilities to prevent a cyber breach and protect your data?
- What are their policies and practices to maintain and ensure uptime and availability of your network and data?

When it comes to connecting and protecting financial organizations, Hamilton means business.

For nearly four decades, Hamilton has delivered the latest technology and telecommunications solutions to businesses and financial organizations like yours. As a Nebraska business with offices and team members across the state, we offer 24x7x365 support from our local, trusted technicians.

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