

# WEALTH MANAGEMENT GROUP- MNS



Capital Business Systems assists a local Wealth Management Group with proactive network management and business continuity, giving them the ability to put full focus on what they excel at: **helping their clients plan for their futures.**

## AT A GLANCE

### Areas of Concern

- Lack of network management
- Lack of Business Continuity
- Security risks
- Lack of end-user training

### MNS Benefits

- Proactive Network Management
- Current Technology
- Business Continuity
- Documentation



We have partnered with Capital Business Systems for our network services for [many] years and copier services for over a decade. During this time, we have always been incredibly pleased with Capital's attentiveness, professional and willingness to assist us with all of our service needs, questions and concerns. Capital is hands on when working with us on our systems, giving us the confidence and peace of mind knowing our systems are well taken care of.

**Melissa D.**  
CFP, CDFA

## OBJECTIVES

The Wealth Management Group began their MNS journey with a few areas that needed attention: lack of Business Continuity, outdated software, lack of system documentation and slightly out-of-date infrastructure. There were also concerns with operational stability and system performance.

## SOLUTIONS

Capital Business Systems was able to address these concerns after performing an assessment of the Wealth Management Group's current IT setup, and presented a plan on how to resolve all areas. **Since 2016**, our MNS team has assisted with proactive network management and ensuring current technology and business continuity.

## BENEFITS

### Proactive Network Management

The Wealth Management Group now has an ongoing, planned proactive management schedule, ensuring peak performance of critical network devices and systems.

### Current Technology

A process has been established to minimize the chances of an outage/slow performance caused by hardware. It includes standardized refresh schedules for technology through a Technology Roadmap.

### Business Continuity

Plans and measures in place to deal with any situations that might affect the IT network, so they are able to continue to provide excellent service to customers without disruption.

### Ongoing System Documentation

There is now ongoing and updated documentation of system design and configuration of their technology systems, effectively preparing them for emergency and minimizing errors by establishing protocols.