

CALIFORNIA-BASED WEALTH MANAGEMENT FIRM TRUSTS KeepItSafe TO PROTECT THEIR CRITICAL DATA

The family wealth consulting group wishes all their relationships were as trustworthy and personal as the one they have with KeepItSafe – and they've never met in person.



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Financial Planner
The Family Wealth
Consulting Group

THE CHALLENGE

The Family Wealth Consulting Group (FWCG) is a Silicon Valley-based, fee-only wealth planning firm providing personalized advice, guidance and service to successful individuals and their families. Backed by decades of experience, their investment and wealth counsel helps clients maximize the value of their resources.

The partners at FWCG were spending a lot of time managing and worrying about their data backup, running tape backups every night and storing the tapes in multiple offsite locations. “It was a huge hassle,” says Hilary Martin, Financial Planner at FWCG. “We weren’t sure if the technology worked, we weren’t convinced the tapes were reliable. It also wasn’t automated and we did not like doing it manually. Backup is such a critical thing for a business like ours and we knew we had to find a better way to do it.”

FWCG manages nearly \$100 million in personal wealth for their clients, and the full service financial advisory firm was storing a massive amount of data on more than 200 individuals and their families. “We were not incredibly tech savvy,” Martin says. “We did not have the capability internally to recover from a major data loss.”

THE SOLUTION

FWCG knew they needed a better, less labor intensive and more reliable backup solution. Their part time IT professional suggested KeepItSafe, which was headquartered across the country in New York City. KeepItSafe won FWCG’s business and their trust, and began doing a comprehensive backup over the internet every night of the firm’s data and documents.


(Since FWCG was required by The Financial Industry Regulatory Authority, Inc. (FINRA), to archive all inbound and outbound correspondence forever, the wealth planning firm continued to use Global Relay, a premier message archiving company, to backup their email to comply with these regulations).



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“We are a paperless office so KeepItSafe began literally backing up everything,” Martin says. KeepItSafe also designed a way to back up both FWCG’s desktops and laptops, something that wasn’t being done before the hosted backup company was hired. “I can’t control how people store their data,” Martin says. “I feel completely covered now that KeepItSafe is watching all our data.” Martin says she really appreciates the personal email she receives from a KeepItSafe technician – as opposed to an automated response – in the event something has gone wrong with the backup the previous night.

A few years after FWCG became a client of KeepItSafe, FWCG installed ACT, software to manage their customer relationships (CRM). It was the first time the California firm had used a SQL database. “We didn’t know how to back it up,” Martin says. “So I called over to KeepItSafe and asked their customer support. Our technician knew exactly what to do. He contacted our ACT consultant in Texas and made it work. I was so relieved by KeepItSafe’s responsiveness and expertise — I didn’t want to have to learn how to do this.”

THE RESULTS

“Once we hired KeepItSafe, we went from being very concerned about data backup to not worrying about it at all,” says Martin. She reports they have never had to do a full restore but have called on KeepItSafe multiple times to retrieve a lost file. “For example, our senior partner has a creative file management system and he loses documents occasionally,” she says. “Sometimes we can find it ourselves, sometimes we need KeepItSafe.”

Martin says she feels the professionals at KeepItSafe are honest, trustworthy and have her best interests at heart. She also appreciates that they help her manage her costs and advise her of ways she can actually save money. “As a small business, you have to be very careful about the partners that you choose,” she says. “I feel like KeepItSafe’s service consultants are on my team.”

Martin sees a big difference in the customer service she gets from KeepItSafe versus other vendors who often act like the problem FWCG is having is not critical, nor a priority. “The relationship we have with KeepItSafe is the same kind of trusting relationship that we want our customers to have with us,” Martin says. “I wish all my relationships were as solid as the one I have with KeepItSafe.”



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