

Customer Success Story

Company Profile



Valeo Financial Advisors, LLC
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Industry

Fee-Only Financial Planning

About Valeo

Valeo provides comprehensive financial planning on a fee-only basis for high net worth individuals and their families across the country. The company was founded in 2002 and is based in Carmel, IN.

nGenX Solution

- Office Anywhere®
- Hosted Exchange
- Additional Storage for Client Data

Key Benefits

- Provides a professional IT solution for their business.
- Improves network security.
- Increases communications for mobile workers.
- Provides 24/7/365 IT support.
- Supports disaster recovery & data back up plans.

"nGenX has brought a professional IT solution to our operation and more reliability to our network,"

**said John Trott,
Managing Member**

Valeo Financial Gains the Secure, Stable IT Infrastructure It Needed to Support Its High Net Worth Clients

Setting the Stage for Change

Valeo provides financial planning services to high net worth individuals who require consummate support and immediate attention. During its early years in business, Valeo sought to manage its IT infrastructure using a combination of internal resources and an external IT contractor; yet, neither of these solutions proved to be the secure, stable IT resource Valeo needed. As the company experienced rapid growth, its IT infrastructure began to demand more and more resources, while never really providing the foundation Valeo needed to support its high-end, high-maintenance client base. As is often the case with nascent entities, Valeo did not have a disciplined approach to managing its IT infrastructure. While Valeo had never experienced any catastrophic events, the company often found itself standing still due to its inadequate IT solution.

John Trott, Managing Member, acting as Valeo's main IT resource, recalls that he was spending a growing amount of time dealing with the company's IT issues, and not enough time cultivating the company's growing client base. But even the time he was spending on IT was not serving the company well: Trott is a financial professional, not an IT professional. Valeo's IT infrastructure worked well early on, but it definitely would not support the demands of a firm with growth plans and clients who demand the best.

Valeo Goals

As the executive team set out to evaluate the available IT solutions that would allow them to provide superior support to Valeo's clients, they sought to build an IT infrastructure that would:

- Provide exceptional security and privacy for client data.
- Allow its employees to have remote access to company data and applications via mobile access devices.
- Provide a world-class IT infrastructure and access to always the latest software releases.
- Support the company's regulatory requirements.

Valeo needed a sophisticated IT solution that would act as a catalyst, and not an impediment, to future company growth. The company has always had a strong philosophy of outsourcing: "If we don't have expertise in a mission-critical area of our business, we find an outsourcing partner; IT infrastructure is certainly one of those areas," said John Trott.

The nGenX Solution

In 2006, Valeo began using the nGenX Office Anywhere® platform as its outsourced IT solution for running its line-of-business soft-



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ware applications and Microsoft Office and Exchange, and for storing and maintaining its company and client data. nGenX provides the Microsoft applications in a SaaS (Software as a Service) environment, and it provides Valeo's other applications in an on-demand environment using virtualization. With this solution in place, Valeo employees access their data and applications from the nGenX SAS 70, Type II certified data center. All data and applications remain highly secure and are backed up at nightly, weekly, monthly and annual intervals.

The Office Anywhere® solution allows the company's principles and employees remote access to client data and company applications as the nGenX solution can be fully accessed via the internet, and its Exchange email services via a Blackberry, Palm or Smartphone.

Benefitting from Office Anywhere®

Valeo chose the Office Anywhere® solution for the security, data back up and stability it provides; the benefits of having an around-the-clock, professional IT resource; and the increased access to client data via a wireless card or Blackberry, or other computers via the internet. Valeo's choice allows them to remain on the leading-edge with their software choices; the Office Anywhere® platform provides Microsoft's latest software releases as they become available. Additionally, it supports Valeo's regulatory compliancy measures which require the company to have a defined disaster recovery plan for client data.

Outsourcing these functions gives Valeo a more disciplined approach to the company's IT. As is the case with many rapidly growing businesses, Valeo's IT requirements were growing without the necessary fore-thought into structure, planning and growth. With the Office Anywhere® solution, their IT growth is supported by a professional team using world-class solutions.



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About nGenX

nGenX is a leading, nationwide provider of on-demand software solutions. The company hosts and manages business applications and data in a virtual, on-demand environment from its SAS 70, Type II certified data centers. Its flagship product, Office Anywhere® is an on-demand software solution which includes Microsoft Office, Exchange email, optional SharePoint and Dynamics CRM, as well as more than 400 line-of-business applications. nGenX's on-demand solutions always include data backup, updates, disaster recovery, remote access and 24-hour customer support. nGenX also offers managed server and colocation services. Formed in 2000, nGenX has been a pioneer in this industry working with software companies such as Sage and Microsoft.