



HOW JJ BURNS, AN \$800 MILLION RIA, PARTNERED WITH AGIO

For Best-In-Breed IT Support



JJ BURNS TURNED TO AGIO

For responsive IT solutions
to their evolving needs.

JJ Burns, an \$800 million independent registered investment advisor (RIA), found itself in a frustrating situation with its current managed service provider (MSP).

The previous provider was acquired by a larger company, and the service quality began to significantly deteriorate. Calls went unanswered, help desk engineers had no knowledge of the firm's ticket history or previous solutions tried, and basic IT tasks like offboarding employees or resetting passwords became major challenges.

This lack of responsiveness and transparency meant the JJ Burns team was forced to handle a significant amount of IT support themselves, taking time away from responsibilities associated with compliance and cybersecurity. Frustrated with the situation, JJ Burns decided it was time to find a new MSP that could provide the level of service and partnership they required.

SOLUTION

After evaluating several options, JJ Burns decided to partner with Agio, a leading provider of IT and cybersecurity services for the financial services industry. Agio's experience specifically in the RIA space, their SkySuite offering, their proactive approach to identifying and mitigating risks, and their focus on transparency and accountability through their proprietary AgioNow client portal, made them an attractive choice.

The transition process was seamless, with Agio working diligently to obtain the necessary information from the previous MSP, onboarding the JJ Burns team to Agio's 24x7x365 remote help desk, and implementing comprehensive network infrastructure upgrades. These upgrades included managing Microsoft licenses, establishing a regular patching schedule, and proactively identifying and addressing security risks. Agio then resolved said identified critical security vulnerabilities by implementing password complexity requirements and anti-virus protection.

The team also replaced equipment previously on loan from the prior MSP, installing and configuring new firewalls, switches, access points, and UPS systems. All new hardware was integrated into the Agio Monitoring System (ASM) for continuous 24/7 monitoring.



OUTCOME

The partnership with Agio has been transformative for JJ Burns. The firm now experiences IT support in which calls are answered promptly by a team who's familiar with their history and specific needs. The AgioNow client portal has also provided complete transparency into the overall migration process and ongoing support, empowering JJ Burns to onboard and offboard employees according to their unique policies, manage passwords, and track tickets with ease. It's this level of service, proactivity, and true partnership that has led JJ Burns to expand their relationship with Agio to include cybersecurity governance services.

Ultimately, the partnership with Agio enabled JJ Burns to re-focus on revenue-driving operations. By reducing the time spent on IT issues, the firm was able to double down on personalized and timely service to their clients, strengthening the foundation of their core business for future growth and scale.

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We couldn't be more impressed with Agio's commitment to understanding our unique needs and delivering tailored solutions. They are truly invested in our success, and it shows through their dedicated teams and proprietary tools like AgioNow.

JJ BURNS

President & CEO



WHY AGIO?

#OneAgio

When you select Agio, you're investing in a relationship with everyone who's a part of this firm. Our teams operate in a symbiotic relationship to deliver an experience that reaffirms to our clients we've got you covered. From clean, concise implementations to consistent support backed by automation, value-add reporting, and thought leadership on the latest IT and cybersecurity trends, we bring the full breadth and depth of our talent to bear.

We deliver #OneAgio.

Contact Us:

agio.com | Support 877.405.2446 | Sales 877.780.2446

