CloudMetric
Secure Data Solutions

CASE STUDY
PROFESSIONAL INVESTMENTS

Outgrowing Basic IT: How Professional Investments Upgraded Security and Support

Professional Investments is an independent financial planning and services firm, operating across southeastern Ontario. Because the firm manages wealth and mutual funds and provides insurance advice, it operates under strict regulatory oversight and cybersecurity compliance mandates. As the organization grew, its IT needs became more complex. The firm needed more than basic support from a lower-cost provider; it required a technology partner that could deliver advanced security compliance, responsive support, and practical guidance around risk.

For Professional Investments, the priority was not simply changing IT providers. The firm needed a partner with the technical depth to meet industry standards, ensuring that data protection, audit readiness, and security compliance frameworks for both investments and insurance operations matched a mature operating environment. Cloud Metric was able to transition Professional Investments toward a stronger managed services model built around proactive security, better visibility, and higher-touch support.

THE CHALLENGE

Professional Investments had outgrown its basic IT support and needed a mature partner capable of handling the stringent security demands of a financial services firm. Key challenges included:

Data Protection:
Safeguarding sensitive financial records, client details, and social insurance numbers.

Complex Network:
Managing unique security and support requirements for an extended network of independent advisors and contractors.

Human Risk:
Providing practical cybersecurity training on MFA, phishing, and safe tool usage for employees and advisors.

Support Demands:
Needing structured escalation paths and a higher-touch, responsive service model.

"As we grew, our IT setup needed to keep pace with the compliance and security demands of our industry. Cloud Metric built a model that fits how we actually operate, with real security training and responsive support. We now have a much stronger foundation to grow on."

Trish Reid - Compliance & Operations Manager

THE SOLUTION

Professional Investments partnered with Cloud Metric to transition to an advanced managed IT and security model focused on visibility, robust tooling, and proactive risk management. Cloud Metric delivered:

Mature Managed Services:
Access to a broader technical team, structured escalation workflows, and reliable day-to-day productivity support.

Advanced Security & Monitoring:
Deployment planning for Field Effect and Huntress integrations to improve endpoint and Microsoft 365 visibility.

Cybersecurity Training:
Practical education for staff and advisors on email security, MFA, and phishing awareness.

Practical Governance:
Enforceable controls on company-owned assets alongside security awareness frameworks for independent contractors.

THE RESULTS

By partnering with Cloud Metric, Professional Investments replaced basic IT support with a technology partnership centred on security and responsiveness, which proved to be an ideal partnership as they continue to grow.

Scalable Support:
A responsive, structured service model aligned with the firm's growth.

Improved Risk Visibility:
Faster issue identification and more effective threat response processes.

Strong Security Foundation:
Advanced endpoint monitoring, managed detection and response, and protected business applications.

Balanced Governance:
Enforceable technical controls paired with heightened security awareness across the advisor network.

THE CLOUD METRIC ADVANTAGE

- **Proactive and Managed Security for your Business**
- **Desktop and Mobile Endpoint Support and Maintenance**
- **Dedicated Account Management and 24/7 Support**
- **Backup and Disaster Recovery Solutions**
- **100% Canadian Owned and Operated**
- **Monthly Review of Environment and Assets**

OUR IT TEAM

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