



Drake & Associates Goes Live with Arcus Partners' Finity360 and Managed Services

Drake & Associates Goes Live with Arcus Partners' Finity360 and Arcus360 Managed Services to Enhance Compliance, Data Resilience, and Salesforce Efficiency

PHILADELPHIA, PA, UNITED STATES, April 8, 2025 /EINPresswire.com/ -- Arcus Partners™, a leading WealthTech and Managed Services provider for SME Wealth Management, RIA, and Broker-Dealer firms, is pleased to announce that Drake & Associates LLC, a Wisconsin-based financial advisory firm, has officially gone live with Finity360™ and Arcus360™ Managed Services as part of a strategic initiative to centralize data and strengthen compliance, operational efficiency, and marketing readiness on the Salesforce platform.

Drake & Associates has implemented Finity360 Backup & Recovery, a fully Salesforce and AWS-native solution that supports compliance with SEC Rules 17a-3 and 17a-4 by enabling immutable storage and secure recovery of books and records within their Salesforce environment. The firm is also leveraging Arcus360 Managed Services to support the implementation and optimization of Salesforce Financial Services Cloud, along with additional Salesforce tools such as CRM Analytics and Salesforce Maps.

By consolidating its data within Salesforce, Drake & Associates is positioning itself for more scalable growth, improved regulatory compliance, and stronger client engagement strategies—all within a unified technology ecosystem.

"Firms today are navigating increased regulatory pressure and digital complexity. With Finity360 and Arcus360 Managed Services, Drake & Associates is making a powerful investment in both compliance readiness and operational scalability," said Gerry Murphy, CEO of Arcus Partners. "We're proud to support their vision with tools that deliver resilience, automation, and expert support—all tightly integrated within Salesforce."

Tony Drake, Founder and CEO of Drake & Associates, added:

"The implementation of Finity360 and Arcus360 was one of the smoothest rollouts we've had. The Arcus team understood our needs from both a compliance and operational perspective. They didn't just know Salesforce, they knew how we work as a business. That made all the difference and allowed us to move quickly and confidently."

The combined power of Finity360 Backup & Recovery and Arcus360 Managed Services enables Drake & Associates to protect sensitive client data, meet regulatory obligations, and enhance business operations across departments—all with a single, trusted technology partner.

To learn more about Finity360 and Arcus360 for Salesforce, visit www.arcuspartners.com.

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About Arcus Partners

Arcus Partners is a leading provider of Cloud-first, AI-driven financial technology solutions designed to enhance efficiency, optimize data management, and streamline workflows for Wealth Management, RIA, and Broker-Dealer firms. With the Finity360 suite, SYNTHIFY, ArcusX AI, and Arcus360 Managed Services, Arcus Partners empowers SME firms to digitally transform operations, centralize business-critical data, and improve client engagement across platforms.

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