

IFC Advisors Chooses AdvisorVault's 17a-4 Managed 365 Service®

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/EINPresswire.com/ -- IFC Advisors, a FINRA registered firm in Los Angeles chooses the AdvisorVault 17a-4 Managed 365 Service® to get 17a-4 compliant on the Microsoft Cloud.

With a mix of outdated technology IFC had a mess compliance wise: an end-of-life server with data scattered all over the place, although they had a Microsoft subscription already, they needed a better Cloud Provider to fully migrate to Microsoft 365 and consolidate their records while simplifying compliance & reducing IT costs.

Cloud Consolidation Meeting 17a-4

"The Key for IFC meeting 17a-4 was centralizing everything on Microsoft 365", Said Allan Lonz, President of AdvisorVault. "For example, they needed to migrate their old server to SharePoint; move PC data to OneDrive; upgrade to Microsoft Business Standard license [provided by AdvisorVault](#)." Added Lonz.

Essentially though, with this move to Microsoft 365 (through AdvisorVault), IFC was fully using the cloud with 50 GB mailboxes on Exchange, 1 TB of space on OneDrive for each user and another TB for SharePoint with Teams added allowing AdvisorVault to archive their entire operation centrally - easily meeting rule 17a-4.

Benefits of AdvisorVault's 17a-4 Managed 365 Service®

By using AdvisorVault's 17a-4 Managed 365 Service FINRA firms get these benefits:

A fully supported and archived Microsoft Cloud for one Flat Monthly Fee



FINRA Cybersecurity with email filtering & threat monitoring built-in

The 17a-4 D3P Service with attestation letters prepared

To learn more how IFC used the AdvisorVault 17a-4 Managed 365 Service getting fully compliant on Microsoft 365 download the [Case Study](#):

About IFC: A boutique investment banking firm that specializes in mergers and acquisitions, capital raising and financial advisory services for middle market clients. IFC is able support the strategic and financial objectives of clients with a level of expertise and professionalism that is traditionally available only from large investment banking firms

About AdvisorVault: A FINRA 17a-4 Designated Third Party (D3P) AdvisorVault has re-invented the way small firms approach compliance with the only consolidated approach designed specifically for broker-dealers, RIAs, hedge funds & private equity firms giving them a fully outsource; fully managed option for the archiving & supervision of electronic records meeting 17a-4 compliance demands.

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