

AdvisorVault Releases New Explainer Video on their 17a-4 Managed 365 Service

NY, UNITED STATES, October 2, 2025 /EINPresswire.com/ -- AdvisorVault has available on their site a [new video](#) explaining the features of their 17a-4 Managed 365 Service.

Finding firms often had a mix of technology (half in-house & half in the cloud), AdvisorVault created the 17a-4 Managed 365 Service. The goal: help close gaps in firms' electronic records retention & supervision while meeting rule 17a-4 by getting firms properly on Microsoft 365.



“We created the 17a-4 Managed 365 Service because FINRA firms often had a mix of outdated technology: end-of-life servers, data scattered all over the place, a real mess with their Microsoft subscription already,” said Allan Lonz, President of AdvisorVault. “But ultimately FINRA firms needed a better Cloud Provider (one who understood their unique demands). The problem I saw was firms weren’t properly managed on the Microsoft Cloud, and at the same time needed to consolidate their records on the cloud, simplify compliance while reducing IT costs.” Lonz added.

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Allan Lonz

Now available: a 2-minute video explaining the features of AdvisorVault’s unique service, designed just for small firms, getting them 17a-4 compliant on Microsoft 365.

[Watch the 2-minute Video](#) of the 17a-4 Managed 365 Service.

Or check out more resources [from their site](#) on 17a-4 Compliance.

Allan Lonz

AdvisorVault

+1 866-732-1407

[email us here](#)

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