

# INFOTECHNOVATION SOLUTIONS FOR FINANCIAL SERVICES

InfoTechnovation's cloud delivers essential IT services that help financial services firms comply with SEC, FINRA, PCI, Sarbanes-Oxley, Dodd-Frank, Patriot Act, Gramm-Leach-Bliley, and CFPB security and privacy requirements.



*Audited security  
controls including  
SOC 2 Type II*



*Mobile device  
management to  
protect data*



*Trusted provider for  
thousands of  
financial services  
companies*



*Admin tools to  
streamline IT  
management and  
security*



*Reliability and  
support with a  
99.999% uptime  
guarantee*

Our Compliance and Security plan includes high security email, file sharing and web application security tools. Everything you need to succeed in today's high-pressure business climate, from encrypting sensitive correspondence, proposals and research to collaborating on due diligence with private room access controls for documents. All available to your team whether they're in the office or on the road with full support for mobile devices.

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CONTACT US

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## START WITH OUR **COMPLIANCE + SECURITY PLAN**

Compliance and Security plan services help you address the security and privacy controls specified by FINRA, SEC, PCI, and SOX regulations.



### **Hosted Exchange**

Provide business-grade, fully mobile email, calendar and contacts to your staff, so workers stay connected and productive.



### **Advanced email security**

Tools that help you eliminate spam and viruses before they reach your users' inboxes. Includes advanced spam and virus protection, company-wide white and black lists, and 24/7 threat monitoring.



### **ConnectID single sign-on and identity management**

Create a single point of access for your web apps, including company and industry research services with 2FA, the strongest industry-standard authentication protocol. Simplify access and support for your users and administrators to save time and boost productivity.



### **Encrypted Email**

Protect against data leaks by automatically encrypting email containing financial or customer information. Enforce compliance based on policies and rules that you define.



### **Email Archiving**

Archiving your email automatically and securely with encryption. Maintain records for auditing, compliance and internal governance purposes.



### **ShareSync file sync and backup**

Negotiating deals, hammer out proposals and renew client policies more easily with secure access and file sharing from any device, anywhere. Get at-rest and in-transit encryption with strict controls over file access. With real-time file backup and point-in-time restore for PCs and Macs.

## ADD THESE SERVICES TO ENHANCE YOUR SOLUTION



### **Hosted PBX**

Experience enterprise-grade phone service with conference calling and automatic call forwarding. Use the softphone mobile app to dial from a mobile device as if you were sitting at your desk.



### **ShareSync 10GB Capacity**

With upgraded capacity, don't worry about running out of room, whether you're gathering lots of large documents for due diligence or maintaining a large library of research, projects or proposals.



### **Skype® for Business Enterprise**

Instantly convert a chat into a conversation or video for richer, more productive project discussions. Share screens to collaborate quickly on proposals.

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## SECURITY AND RELIABILITY THAT GOES ABOVE AND BEYOND THE COMPETITION



**Annual SOC 2 Type II audit** attests to our gold standard for security and capabilities that help address FINRA, SEC, PCI and SOX requirements.

- InfoTechnovation's Hosted Exchange Email with Archiving provides secure, tamper-proof storage that supports SEC-mandated record retention.
- Geographically distributed datacenters architected to assure availability in the event of service disruption.
- Redundant data storage in geographically distributed datacenters meets all conditions set forth in SEC Compliance Rule 17a-4.



**Dedicated Security Team** with certified security experts.

- A dedicated, full-time security staff certified in information security
- Covers all aspects of security, including log and event monitoring, incident response, managing intrusion prevention systems (both host and network), perimeter defense, service and architecture testing, and source code reviews.



**Admin tools to streamline IT management and security.**

- Centralized control over users and services and granular configurability.
- Admins can quickly provision, de-provision and configure security controls, and also delegate setup and management to non-specialized staff.
- Single sign-on technology that comes with all InfoTechnovation's applications safeguards sensitive financial and customer data and web-based applications.



**Trusted provider** for thousands of companies in financial services, securities and banking.

- Ann Arbor Annuity Exchange
- Certified Home Loans
- Commerce Bank & Trust
- Franklin Capital
- Freeport Commodities
- Pacific Crest Securities
- Standardline Brokerage
- And many more



**Reliability and support you can count on.**

- With InfoTechnovation's 99.999% uptime guarantee, you can access your cloud services when needed, staying connected and productive.
- Receive 24/7 phone and chat support any time you need expert help.



**Mobile device management and security.**

- Purposefully built to protect data wherever it is accessed.
- Our email system includes mobile security controls and policy enforcement for the admin including remote wipe for employees with mobile devices.