

# SPIRE Investment Partners

How Spire Investment Partners Secures Remote Advisors  
and Keeps up with New Compliance Regulations



**SPIRE**

## The Challenge:

- ! Needed an easier way to secure email, applications and data for remote workers as company grows.
- ! Difficult to keep up with the frequent new regulatory requirements to protect confidential data.
- ! Implementing support for mobile and remote users on any mobile device or laptop.

## The Results:

- ✓ Reduced time to onboard and offboard remote advisors from days to minutes.
- ✓ Improved compliance and security for advisors who couldn't previously do it on their own.
- ✓ Gained consistent security for email, data and applications on any mobile device or laptop.

“By using **Venn**, we can leverage our time and talent to help our advisors be more successful. The solution helps Spire and our advisors compete with the larger firms by leveraging the same technology and levels of data security.”

— David Blisk, CEO, SPIRE Investment Partners



**EXPERIENCE**  
Over 25 Years

**5000**  
Fastest Growing Firms in the United States

**HEADQUARTERS**  
McLean, Virginia

**INDUSTRY**  
Financial Services

**TYPE**  
Privately Held

## About Spire

Spire Investment Partners is an SEC Registered Investment Advisor and a FINRA Licensed Broker Dealer headquartered in McLean, Virginia, with affiliates throughout the United States. Consistently noted in the Financial Advisor Magazine rankings of top RIAs, Spire was recently named in the Inc.

5000 fastest growing firms in the United States. Spire enjoys clearing and custody relationships with leading custodian firms across multiple platforms. The company focuses on growing its business by offering trading, client management, and technology solutions for independent wealth advisors.

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## The Challenge

### Keeping up with a fast moving industry

Spire serves the research, trading and back-office needs of its affiliated advisors with technology that provides a key competitive advantage. The company outsourced their IT to a traditional managed services provider for many years. As technology, business and user needs changed, Spire realized that this solution could be greatly improved upon with a fresh perspective.

With the ability to do business through five leading financial custodians, Spire needed a single way to deliver access to their unique trade platforms to its advisors. As each of these custodian firms have their own platform, Spire needed to be certain that connectivity would be technically accurate, secure and reliable.

**“As we grew and added new applications and data sources, the previous platform couldn’t keep up,”** said Steve Donald, Vice President and Director of Business Relations for Spire.

Spire also needed support for mobile and remote users. **“Our advisors and their clients increasingly access their account data and trading applications on mobile devices,”** says David Blisk, Chief Executive Officer for Spire. **“And, when our advisors or employees can’t get into the office, they need the ability to work from a remote location with full access to all of their work tools and information.”**



### David Blisk

Chief Executive Officer for Spire

When our advisors or employees can’t get into the office, they need the ability to work from a remote location with full access to all of their work tools and information.

# The Solution

## Secure Access to email, data and applications for remote workers

Advisors access secure email, data, and applications through Venn. The only requirement is an Internet connection and a mobile device or laptop. Advisors may also install their own approved applications on Venn, giving them easy access to all the business tools they use on a daily basis.

## Fast Onboarding and Offboarding:

Advisors access secure email, data, and applications through Venn. The only requirement is an Internet connection and a mobile device or laptop. Advisors may also install their own approved applications on Venn, giving them easy access to all the business tools they use on a daily basis.

Spire helps administrative users work effectively from anywhere with access to IT services through Apple iOS and Android clients. **“I can even create new users and change configurations for Venn using my smartphone,”** says Eickelberg. This real-time access is especially important for protecting data and applications when a user’s login must be deactivated.

**“We need to move fast in delivering IT services to our advisors, so we don’t want to put capital into hardware and an IT infrastructure that will be obsolete in just a few years.”**

— David Blisk, CEO, SPIRE Investment Partners.

## Focus on the business, not on IT

**“We felt very comfortable, very quickly that Venn understood our business,”** says Allen Eickelberg, Business Development Associate at Spire. The migration to Venn went well overall and Spire’s new services were activated in a very short time frame compared to the company’s experience with other large technology conversions. **“It was refreshing how well the migration went and how responsive Venn personnel were in resolving the issues that came up,”** Eickelberg added.







# Improved compliance for security and privacy protection

Regulators frequently issue new requirements for advisors to protect the confidential data of their clients and business. Venn helps Spire users meet these requirements, and offers a valuable service to advisors who would not be able to implement or maintain this level of security on their own.

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Reprogramming IT security for remote work



More freedom and choice in the way we work remotely



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