

# tru Independence

How tru Independence Evolved a Local Solution  
for Independent Financial Advisors

tru



## The Challenge:

- ! Needed to safeguard sensitive customer data with robust security without impacting user productivity.
- ! Their hosted workspace had challenges with poor user experience, slow performance and responsiveness and frequent crashes
- ! Needed to support remote work, SaaS, video conferencing, mobile access and Bring-your-own-device (BYOD)

## The Results:

- ✓ Met data security needs with greater control while ensuring regulatory compliance.
- ✓ Reduced support requests by 75-50%
- ✓ Delivered a local, secure workspace on personal devices which improved user experience

“Venn gave us additional flexibility to better serve our clients and end users— and they’re happier because of it.”

**tru** independence

**EXPERIENCE**  
Over 8 Years

**INDUSTRY**  
Financial Services

**HEADQUARTERS**  
Portland, Oregon

## About tru

tru Independence empowers independent financial advisors to enhance and grow their businesses through services in business formation, technology & infrastructure, marketing, legal & compliance, operations, investment & research, and real estate. Based in Portland, Oregon, tru partners with financial advisors to simplify business processes.

## The Challenge

With dozens of clients and hundreds of users, tru Independence understands just how important it is to safeguard sensitive customer and client data in today's cybersecurity environment. tru wanted a solution that wouldn't compromise productivity for security. They were looking for a solution that could provide robust security with minimal impact on user productivity.

Knowing how financial advisors today work, tru Independence also wanted a solution that would be compatible with remote work, SaaS, video conferencing (Zoom), Bring-your-own-device (BYOD) and mobile access.

When tru Independence was founded, the company recognized the need to provide clients with a secure way of working no matter where they were. After evaluating other solutions and considering building one in-house, tru chose to partner with Venn for its expertise in security and compliance. tru implemented Citrix XenApp - a fully hosted workspace that allowed users to access work apps and data on any network.

### **tru had challenges inherent with any fully hosted solution:**

-  Poor user experience
-  Slow performance and responsiveness
-  Frequent crashing and lockouts
-  User disconnect between hosted and local browsers
-  Incompatibility with integration points
-  Lack of personalization for clients

# The Solution

## Achieving Goals with Venn

Venn understood the challenges of virtual desktop solutions in providing exceptional user experience while ensuring security and compliance. Venn set about developing a better way. In 2020, tru Independence moved to Venn's Zero Trust Platform – a new approach that protected sensitive applications while empowering users to work locally on their personal devices and access everything they need within a secure perimeter that ensures data security and regulatory compliance. Venn brought immediate improvements for tru Independence and its clients.

“What Venn has always understood on a very fundamental level is that security and productivity cannot, and should not, be opposing forces. When users can't get their jobs done, security is going to suffer – one way or another.”

## Improved Security and Compliance

- Local, secure workspace on personal devices
- Personalized security policies for clients
- Ability to use local apps and clients' own operating systems
- Customized integrations
- More control over endpoint security

## Elevated User Experience

- 75-80% fewer support requests
- Faster incident response and recovery
- Improved connectivity
- Enhanced touchpoints with clients



“**Paul Dalton**

Chief Technology Officer.

The security model we have with Venn has been extremely beneficial for us from both an overall best practices and compliance perspective and from a functional perspective for our end-users.



# Looking Ahead to a More Local Future with Venn

tru is first in line to adopt Venn's latest innovation, the Venn Secure Enclave. In today's remote work environment, clients expect solutions that allow them to work how they want, where they want, and when they want. With Venn, tru Independence has been able to offer that flexibility while still maintaining the highest level of security for its clients and their financial advisors. Venn promises to keep tru and its users productive, protected, and private whatever the future of work holds.

“What the Venn team has built is a game changer, a virtual desktop alternative that will be a surefire way for us to empower financial advisors with new ways of working.”

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