



I.T. MATTERS, INC.

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Solutions & Success

The Inside Story



**Client
Industry
Respondent**

Financial Synergies Wealth Advisors
Financial Planner
Marie Villard, Director of Operations



I.T. Matters Offers Client-Focused IT Support For Financial Synergies

Since 1984, Houston-based financial services firm Financial Synergies has been offering a wide range of wealth management solutions to individuals, families, and businesses. Their team of experienced financial advisors strives to help their clients simplify their financial lives with holistic planning and comprehensive investment management strategies.

They offer a wide range of financial solutions that include: retirement planning, estate planning, tax planning and preparation, college and education funding, risk management strategies, long-term care planning, portfolio design, and asset allocation analysis.

Financial Synergies Needed An IT Partner To Keep Them Secure, Compliant, And Productive

The financial services industry is so complex that it's nearly impossible to be an expert in every facet. It's not enough to understand how the banks work or how to leverage assets effectively—today's financial world requires technological expertise too.

That was the issue for Financial Synergies' leadership team. They need a secure, compliant, and functional IT environment to do what they do at the standard to which they hold themselves. Unfortunately, managing that internally is easier said than done.

"I wore the CTO hat until I met I.T. Matters," says Marie Villard, Director of Operations and Chief Compliance Officer for Financial Synergies. "I used to do all the IT decision-making myself, and now I've got I.T. Matters as my help."

Before partnering with I.T. Matters, Financial Synergies managed their IT well enough, ensuring they were secure and compliant. However, the IT work was an ongoing burden on staff members like Villard, taking time and attention away from other matters. Furthermore, as IT and cybersecurity have become more complex and more important in recent years, Villard recognized that Financial Synergies would need a more formal and reliable IT support arrangement.

"We had a pretty basic setup in terms of making sure we were as compliant as we could be, finding devices that were top of the line, and more," says Villard. "It was becoming clear to me that the industry was changing, and cybersecurity was becoming a huge focus, especially in the financial services industry."

And so, Villard and the team at Financial Synergies began searching for the right IT partner. Not just any company would do; they wanted to work with a managed services provider that offered expertise in both technical matters and client service.

"I was trying to manage all of that on my own, but I'm not an IT professional," says Villard. "Finding someone that knew what they were doing was very important to me."



Why Did Financial Synergies Choose I.T. Matters?

"One thing that stood out was that I.T. Matters was very client-driven, which is something we push for in our work," says Villard. "The fact that our philosophies aligned was a big deal for us."

In meeting the I.T. Matters team, Villard and the leadership at Financial Synergies were immediately impressed with the attention I.T. Matters gave to client service. The I.T. Matters team knows that IT is about more than functional technology; they understand that they have to be responsive to the users as well.

In the first series of meetings between the two companies, Villard presented a long list of questions about IT and potential scenarios to determine how the I.T. Matters team would handle them—I.T. Matters passed with flying colors.

"Having that clear and consistent communication with a service provider is very important to me," says Villard. "I felt that we were aligned and that all of the things we focus on are similar. I was really impressed with that."



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Financial Synergies Trusts I.T. Matters To Get The Work Done

“Normally, IT professionals don’t have the soft skills in addition to the technical skills,” says Villard. “Every time we talk to I.T. Matters, they just handle it.”

One of the primary reasons Villard and Financial Synergies appreciates I.T. Matters’ support is because they follow through each and every time they need help. No matter how big or small the request, I.T. Matters does what it takes to address it in a lasting fashion.

“I.T. Matters just handles it—they don’t get into the nitty-gritty technical details,” says Villard.

Furthermore, I.T. Matters has demonstrated an ongoing commitment to keeping Financial Synergies confidently secure. When the two companies first partnered together, I.T. Matters performed an extensive vulnerability scan of their IT environment; while they did not find any glaring issues, to this day they continue to double-check their defensive posture to ensure nothing gets overlooked.

“I.T. Matters is dedicated to making sure we’re secure,” says Villard. “They are still looking, and I appreciate that. That’s above and beyond.”



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I.T. Matters Is An Expert IT Partner That Financial Synergies Can Talk To

In summary, I.T. Matters changed the way that Villard and the Financial Synergies team think about IT companies. They had gotten used to working with technical experts that lacked communication and client-service skills, and then they met I.T. Matters.



I.T. Matters is off the charts when compared to other IT companies"

- says Villard.

Over the course of this partnership, I.T. Matters has demonstrated both IT expertise and a commitment to communicating consistently and effectively, ensuring Financial Synergies' concerns are heard, their problems solved, and their IT stress is alleviated.



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