



# Evolving a Local Solution for Independent Financial Advisors



## The Client: tru Independence

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.

tru Independence by the **Numbers**

**23**

clients

**Decades**

of RIA industry experience

**175+**

users

**7 years**

using Venn's services



*"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."*

**Paul Dalton**  
Chief Technology Officer



## Security & Compliance Goals

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.



**Robust safety and security**



**Minimal impacts on user productivity**



**Allow users to work locally**

*"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."*

Knowing how financial advisors today work, tru Independence also wanted a solution that would be compatible with:

- ✓ Remote work
- ✓ SaaS
- ✓ Zoom and video conferencing tools
- ✓ Bring-your-own-device (BYOD)
- ✓ Mobile access

## The Challenge: Elevating User Experience

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 regulatory and compliance. tru partnered with Venn to implement the Citrix XenApp. The solution was a fully hosted workspace that allowed users to access work apps and data on any network.

But tru had challenges inherent with any fully hosted solution:

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

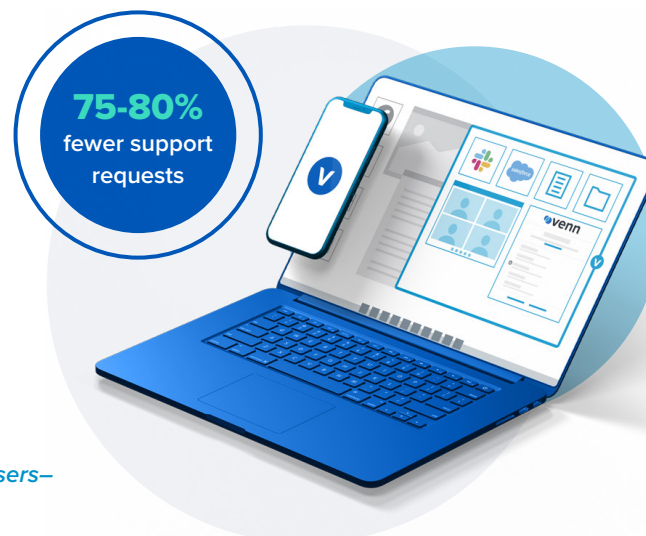
## The Solution: Achieving Goals with Venn

Based on experiences with clients like tru, Venn saw 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. The Zero Trust Platform brought immediate improvements for tru Independence and its clients.

- ✓ Local, secure workspace
- ✓ Personalized security policies for clients
- ✓ Ability to use local apps and clients' own operating systems
- ✓ Customized integrations
- ✓ Improved connectivity
- ✓ 75-80% fewer support requests
- ✓ Faster incident response and recovery
- ✓ More control over endpoint security
- ✓ Enhanced touchpoints with clients

*"Venn's Zero Trust Platform gave us additional flexibility to better serve our clients and end users—and they're happier because of it."*



## Looking Ahead to a More Local Future with Venn

tru is first in line to adopt Venn's latest innovation, a true Virtual Desktop Alternative powered by its breakthrough LocalZone™ technology.

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. LocalZone promises to keep tru and its users productive, protected, and private whatever the future of work holds.

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*"What the Venn team has built with LocalZone is a gamechanger, a virtual desktop alternative that will be a surefire way for us to empower financial advisors with new ways of working."*