

Elevating Financial Services through Technology and Security

In TSM Wealth Group, established in 2022, embarked on a mission to redefine the landscape of financial planning and investment advice. With a focus on comprehensive, objective advice, the firm quickly distinguished itself in the competitive Australian financial sector. The combination of experienced professionals, client-centric services, and an unwavering commitment to quality and trust set TSM Wealth Group apart.

Background: A New Paradigm in Financial Advice

TSM Wealth Group's foundation is built on the principle of delivering peace of mind through quality financial advice. Licensed through RI Advice Group and unaligned with any financial institutions, the firm ensures unbiased investment recommendations, a rarity in an industry often clouded by conflicts of interest. This independence, coupled with a qualified, experienced team, provides clients with a trustworthy and holistic financial planning experience.

Objectives

TSM Wealth Group set forth clear objectives to navigate its strategic vision:

- **Secure Client Data:** Implement the highest levels of cybersecurity to protect sensitive client information, ensuring trust and confidentiality.
- **Empower Flexibility:** Enable staff and partners to work effectively across different environments, enhancing productivity and collaboration.
- **Foster Growth:** Build a scalable IT infrastructure that supports business expansion and development across regions.
- **Enhance Client Engagement:** Utilise technology to improve client communication and service delivery, ensuring a personalised and efficient client experience.

"The partnership with Technology in Depth has been a cornerstone of our strategy to offer secure, cutting-edge financial services. Their expertise in setting up our IT infrastructure has not only empowered our team but also reinforced our commitment to our clients' security and peace of mind."

- Murray Harvey,
Partner of TSM Wealth Group



The Challenge: Building a Secure, World-Class IT Infrastructure

In its formative phase, TSM Wealth Group recognized the need for a robust IT infrastructure that could support its vision of offering personalized, high-quality financial services in a secure and flexible environment. The firm aimed to establish a digital foundation that would allow seamless, secure access to information and collaborative tools for staff and partners, regardless of their location.

The Solution: A Partnership with Technology in Depth

Technology in Depth was enlisted to craft a state-of-the-art IT infrastructure for TSM Wealth Group, focusing on the highest levels of cybersecurity. Leveraging Microsoft's ecosystem, Technology in Depth implemented a comprehensive suite of solutions, including:

- **Microsoft Intune** for advanced device management and security,
- **Microsoft Entra** for secure and efficient identity and access management,
- **Microsoft Defender** for robust cybersecurity defense,
- **Microsoft Purview** for data protection and governance.

This infrastructure facilitated secure email, collaboration via Teams, SharePoint, and OneDrive, and was underpinned by cyber policies and procedures aligned with ISO 27001 standards. Enhanced security measures such as role-based access, Endpoint Detection and Response (EDR), Managed Detection and Response (MDR), and around-the-clock monitoring through a Secure Operations Centre (SOC) were also integrated.

Outcome: Enhanced Business Growth and Client Trust

This digital transformation enabled TSM Wealth Group to not only build and enhance its business operations but also to expand its presence across New South Wales. The firm now operates in a secure, trusted environment, fostering open communication and collaboration with clients. This has been instrumental in TSM Wealth Group's continued development and growth, solidifying its position as a leader in financial services.

Conclusion

TSM Wealth Group's collaboration with Technology in Depth has set a new standard for the integration of technology and cybersecurity in financial services. This partnership has not only provided TSM Wealth Group with the digital tools and security measures necessary for modern financial planning but has also reinforced the firm's commitment to delivering unbiased, quality financial advice. Through this strategic approach to IT infrastructure and cybersecurity, TSM Wealth Group continues to offer unparalleled service to its clients, ensuring their financial well-being and peace of mind in an ever-evolving digital world.

