

CASE STUDY

Financial Services Firm Stops Living in Fear of Security Breaches



FIRM SNAPSHOT

- **Firm:** Adam Dekker Financial Services
- **Owner:** Adam Dekker, CFP®, EA, CDFA®
- **Staff:** 3 team members (expanding to 4 within 3-6 months)
- **Services:** Financial planning and tax services
- **Business Model:** 100% digital, cloud-based operations
- **Previous Setup:** DIY security with off-the-shelf antivirus, cloud storage, and Google searches
- **Years with Verito:** ~1 year
- **Discovery Source:** NAEA (National Association of Enrolled Agents)
- **Current Service:** VeritGuard (Managed IT)

THE CHALLENGE

Adam Dekker runs a digital financial services firm where **data security isn't optional it's everything**. "We can't work if our data isn't accurate, properly secured, and uptime is 100%."

For years, he was his own IT department. "Our solution before was basically me doing everything in-house. We had kind of cobbled together a variety of solutions from off-the-shelf antivirus and a cloud-based data server and just Googling, 'Hey, how do I set these best practices for laptop security?'"

It was a massive time investment. "I did the best I could, but **I am not an IT person** and we're too small of a company to hire dedicated staff."

Worse than the time drain was the constant anxiety. "**I was constantly living in fear** of a security breach or something like that. That would have been very bad for our business. And I didn't have a solution."

If something catastrophic happened, his plan was terrifying: "I probably would have just said, 'Hey, we got to buy a new computer and there's going to be some serious downtime while I not only get the computer, but get it up and running, restore what we had.' And then **who knows why it broke in the first place.**"

Then the **IRS WISP requirement** became unavoidable. "A big part of what initially drew me to Verito was the requirement of the **Written Information Security Policy**. I was like, 'Well, I don't know how to write that on my own.' I realized I could just download something boilerplate, but everybody's like, 'Yeah, that doesn't really protect you because it's not customized.'"

WHY VERITO

Adam discovered Verito through **NAEA**, where he'd been a member for a couple years.

The WISP was the foot in the door, but the comprehensive approach sold him. "What I really liked was that it was like, 'Hey, we're not just going to write the policy for you. We will take steps to make sure that your online environment is secure with the cybersecurity, the backup, the regular checks, everything like that.'"

That was exactly what he needed: **an all-in-one solution**. "I didn't know it, but that was what I was looking for kind of an all-in-one solution where I could **offload the security management of our company to somebody else who actually knew what they were doing.**"

The price made sense too. "It comes at a reasonable price where I'm not hiring a full-time IT staff that I don't need or have the resources to pay for."

AT A GLANCE

FIRM SNAPSHOT

- **Name:** Adam Dekker
- **Staff:** 3 team members (expanding to 4 within 3-6 months)
- **Services:** Financial planning and tax services
- **Years with Verito:** ~1 year

THE CHALLENGE

- Adam managed IT himself with piecemeal tools, spending huge time and energy without real expertise.
- He constantly worried about security breaches and had no reliable disaster recovery plan.
- The IRS WISP requirement pushed him to seek professional help leading him to Verito for compliant, customized security.

WHY VERITO

- Adam found Verito through NAEA and was first drawn in by their WISP offering.
- He valued Verito's full-service approach covering cybersecurity, backups, and regular system checks.
- Verito provided an affordable, all-in-one alternative to hiring dedicated IT staff.

THE SWITCH

Perfect timing. Adam was onboarding a new employee and replacing six-year-old computers across the firm three people, three new computers.

The last time he'd set up new computers, **it took almost a week**. Six computers. A week of his time doing nothing but IT setup.

This time? **Less than a morning**. "All we had to do was set up the account, get logged into the computer, schedule a time to get all of the computers set up. It was **much, much easier**. And I knew everything was set up right. All I had to do was give the computer to the employees and be like, 'Here's your login information,' and they were good to go."

THE RESULTS

The fear is gone. Adam no longer lives in constant anxiety about security breaches or catastrophic downtime. "It takes a lot of **mental load off of my plate as a business owner** to know that somebody is looking out for my computers, making sure that we can continue to do our job."

Regular quarterly check-ins keep everything maintained proactively. "I really like the regular check-in calls. They do a checkup on all of our computers. We have time with the IT staff. Like, **we're talking to real people. We're not submitting help tickets.**"

The security runs in the background without interfering with work. "It's not overly restrictive. I'm not getting employees calling all the time like, 'Hey, this site or this app is blocked, I can't do my job.' I know it's there and I know it's working, but **it's not obtrusive getting in the way of what we're trying to do.**"

When team members have issues, they handle it directly. "One of the other advisors has had some issues with web-based applications not working. She was able to schedule a time for them to look at it and got it resolved. **I don't even know what the cause was, which is great.** I didn't even have to hear about it."

He's hiring another team member in the next 3-6 months and he's **not dreading the IT setup**. "I wouldn't say I'm looking forward to it, but I have no doubts about the ease of getting that set up."

AT A GLANCE

THE SWITCH

- Adam upgraded three computers while onboarding a new employee perfect timing for a smoother setup.
- Previously, setting up six computers took him nearly a week of hands-on IT work.
- With Verito, setup took less than a morning quick, seamless, and correctly configured from the start.

THE RESULTS

- Verito eliminated Adam's security worries with proactive maintenance and quarterly check-ins led by real IT staff.
- The system runs quietly in the background secure but never restrictive or disruptive to daily work.
- Onboarding new team members is now smooth and stress-free, giving new hires a strong first impression.

No more playing dual roles during onboarding. "There's enough on my plate between training them, getting them up to speed. But to try and wear two hats and be a tech support person to them as well—it **slows everything down**. It was very nice not to have to run into those issues this time."

The difference in first impressions matters too. "If somebody joins your team and half their stuff doesn't work, they're like, 'Maybe I didn't... why did I do this? **Mistakes were made.**'"

THE BOTTOM LINE

Adam went from being his own overwhelmed IT department—living in constant fear of security breaches with no real solution—to **professional IT management that runs in the background and keeps his digital business secure.**

"**I would rather have an expert do it.** It's a very nice thing not having to spend my day Googling stuff. That's not a great way for me to spend my time."

Want similar results? Learn how Verito helps financial services firms meet IRS security requirements and eliminate IT anxiety—without hiring full-time IT staff.

AT A GLANCE

THE BOTTOM LINE

- Adam shifted from DIY, stressful IT management to expert, worry-free professional support.
- Verito now handles security and compliance seamlessly, freeing him to focus on his business.
- Financial firms can achieve the same peace of mind—meeting IRS requirements without full-time IT costs.

