

STRAIGHT TALKING FINANCIAL ADVICE

ADVICE FOR ALL SEASONS

Financial planning to grow your wealth



Verdant Financial Planning is a young company, with a highly qualified and experienced team providing tailored, expert financial planning advice to individuals.

A very client-focused business, Verdant Financial Planning prides itself on placing clients and their interests at the heart of the business, and appreciates that level of service support from Extech Cloud.

Extech Cloud helped create a modern workplace for financial services provider, Verdant Financial Planning

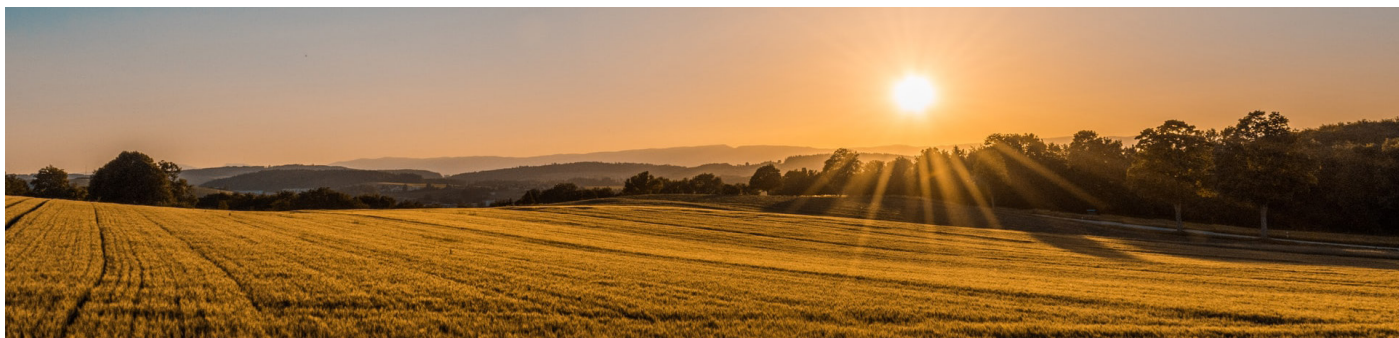
Background

Extech Cloud began working with Verdant Financial Planning in June 2020, as the business was being founded. As a start-up business with just one employee, Verdant Financial Planning recognised the importance of a dependable, easily accessible IT solution to help run the business smoothly and effectively. Eighteen months later the company had grown to a team of eight staff based in different parts of the country, so it was also important for the IT solution to be flexible and cover multiple locations.

Verdant Financial Planning approached Extech Cloud for expert advice because the organisation has experience working with start-up businesses in the wealth management industry. On the guidance of the highly experienced and professional team, Verdant Financial Planning opted to position its IT network completely in the Cloud.

“We trust the advice given by Extech Cloud and value the support they provide. The IT system they have set up for us is working well, as is our partnership with Extech Cloud.”

Verdant Financial Planning



Journey to the cloud

A **feasibility study** carried out by Extech Cloud identified the specific IT needs of Verdant Financial Planning and the advantages of using the Cloud, including cost benefits. Day-to-day tasks in the financial planning business, are 20% advising clients and 80% administrative, so the geographically distanced Verdant Financial Planning staff members need to be able to easily collaborate.

Rather than sharing folders and sending hundreds of emails back and forth, Microsoft's **Modern Workplace technologies** enable shared access to live documents that can be continually updated by multiple people, in different locations.

Cybersecurity and compliance are key aspects of Verdant Financial Planning's IT infrastructure, due to the sensitive nature of the data handled. Through its close links with authoritative cybersecurity and compliance organisations, Extech Cloud ensures that Verdant Financial Planning keeps up with constantly changing security threats and compliance.

Day-to-day support

Extech Cloud supports Verdant Financial Planning with absolutely everything IT-related. That includes helping the company to specify suitable hardware, support in backing up valuable data, ensuring compliance and cybersecurity, and providing support when needed – even if it is just helping to get the printer to work.

Extech Cloud provides flexible end-to-end, award-winning, **bespoke IT support** to suit Verdant Financial Planning's specific needs.

One of Verdant Financial Planning's long-term goals is to become a **carbon neutral business** and being established in the Cloud is a step towards that. It gives staff the ability to work remotely and still securely access and update documents, access emails, attend online meetings and much more, anywhere in the world from a mobile device.

“We value the excellent client support that Extech Cloud provides, because that's one of our biggest strengths as a business as well. We trust in the experience and skill of the Extech Cloud team, and gladly follow their advice. So far, our experience of Cloud IT solutions has been positive. Everything seems to be working well, is backed up, and straightforward to use.”

Verdant Financial Planning



If you need one-off **IT support** to get your team working from home and the office (hybrid) more effectively, **Extech Cloud** can help. We can take your whole business operation into **the Cloud**, giving you the freedom you need with affordable monthly payments. Break the IT CAPEX cycle!

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Gold Cloud Platform
Gold Cloud Productivity
Gold Application Development
Gold Small and Midmarket Cloud Solutions
Silver Collaboration and Content

