

Advisor Virtual Desktop

FAST | COMPLIANT | SECURE

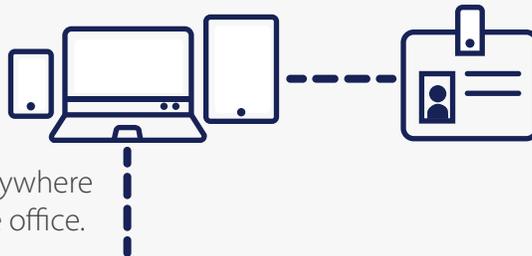
As a Qualified Technology Partner (QTP), ITEGRIA provides a 360-degree, comprehensive approach to your firm's technology needs through the **Advisor Virtual Desktop**. The Virtual Desktop delivers a fully personalized and familiar desktop experience, with all the security and simplicity of centralized management for your firm.



How Our Virtual Desktop Works For You

MOBILITY & FLEXIBILITY

Empower your employees with access to all of their tools and data from the office, home, or anywhere remotely. No data is stored at the office.



PERMISSION MANAGEMENT

You control which users can access what data and manage devices, files and applications all in one place — ensuring Cybersecurity for your clients.

ALL APPLICATIONS



DOCUMENTS



FOLDERS



CALENDAR



EMAIL



Service & Support

EXPERT KNOWLEDGE



ONSITE SUPPORT



REGULATORY AUDIT SUPPORT



PHYSICAL OFFICE SET UP



RIA CENTERED HELP DESK



SECURITY & COMPLIANCE

Ensure that your client data is always safe and stay ahead of regulatory mandates with Advisor Virtual Desktop.



DISASTER RECOVERY

Through Advisor Virtual Desktop your cloud network is replicated to many different data centers, allowing you to continue to serve your clients from anywhere should any of the sites go down.

Advisor Virtual Desktop Benefits

- Your firm's data is hosted on a private, secure, compliant cloud network.
- The MyRIACompliance Dashboard is an automated dashboard for virtual desktop reports, support documents, and other related content.
- ITEGRIA, a Division of RIA in a Box, is recognized as a Qualified Technology Partner (QTP).
- Data can be accessed from anywhere on virtually any device (PC, Macbook, iPad, Android, Chromebook, etc.), so your team members aren't tied to a specific location or device.
- Your employees have a consistent user experience whether they access their environment from the office, home, or anywhere remotely.
- Data no longer resides on any physical devices. If you do not have access to your office or a true disaster occurs, you can continue to service your clients seamlessly. Users can securely access all data remotely in the same fashion as they do within the office.
- Robust defense tools such as multi-factor authentication, internet web content filtering, and vulnerability management ensure that Cybersecurity is top priority.
- Data can only be accessed within the secure, compliant Advisor Virtual Desktop platform. Physical devices are "dummy terminals" and do not maintain any data at all.

Frequently Asked Questions

What is the benefit of a Qualified Technology Partner (QTP)?

A QTP delivers an optimal technology environment for RIA firms; not only from an operational perspective, but also from a compliance and security perspective.

Where will my data be?

Your company tools, applications and files will reside in our highly resilient, redundant, compliant and secure data centers. No tools or data are installed on your PCs.

How will my data be secured?

ITEGRIA implements a rigorous vulnerability management program — as well as many defense technologies such as multifactor authentication, antivirus, web content filtering, etc. — to ensure that your client information is always secure.

Do we need servers for anything if we move to the cloud?

No, Advisor Virtual Desktop completely eliminates the need for physical servers.

How can my team access company data?

Your team can access all of your company tools, applications and files from any location, as long as they have a device and a reliable internet connection. The user experience will be the same, no matter what device they use.

What devices can we use to access data?

Your employees can use a Windows PC, Mac iOS, iPad, Android device, Chromebook, or virtually any other device to access their Advisor Virtual Desktop network. Regardless of what device is used, they will see the same exact platform.

How do we scale our cloud network as my company grows?

Scaling your network is simple, quick, and efficient with Advisor Virtual Desktop. A virtual workstation will be created for each new employee, which will include the user access and rights that your firm assigns to them, as well as all the tools and applications they should have access to and they are ready to begin servicing your clients.

What happens if there is a disaster?

In the event of a disaster at your office, there is no impact whatsoever to your ability to service clients. As long as your employees have a safe location with a device and a reliable internet connection, they can access all of your company tools, applications and files that they normally do in the office.

How do we show auditors that our cloud network is compliant?

ITEGRIA provides technology-related compliance reports and documentation to ensure that your firm can always demonstrate that you are meeting regulatory requirements. In the event of an audit, ITEGRIA is by your side, supporting you with any additional document requests and answering questions for auditors, relative to your technology environment.



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