



# Customer Experience

## Lara, May & Associates

### Formula for Success

Lara, May & Associates (LMA) is an independent, wealth management firm serving high net-worth individuals, non-profits, and businesses from its offices in Falls Church, Virginia and Frisco, Colorado. The firm attributes its 35 years of success to providing clients with unsurpassed personal service and attention. This is achieved by empowering its advisors with a high degree of flexibility and autonomy supported by access to advanced IT systems and financial applications.

### Transition to Virtual IT

Having provided LMA with comprehensive IT services for several years, DataLink was tasked with transitioning LMA's in-house equipment and financial applications to the Cloud. The business objectives included: reliability, security, simplifying IT management and saving money. The Cloud now enables financial advisors to have secure, reliable access to corporate resources from any location and from any device. Instead of consuming time traveling to the office, advisors have more time to focus on client needs.

These goals were accomplished by migrating LMA's physical IT infrastructure to a Virtual Desktop Infrastructure (VDI) hosted in a tightly controlled SSAE16 and SAA70 data center where everything is managed and maintained by DataLink. The added security provided by DataLink's Cloud solution enables LMA to be compliant with the full range federal and industry regulations intended to protect the integrity of financial systems.

### Real Savings

Except for the computers and mobile devices needed to connect to the Cloud/VDI environment, there is no capital expense for LMA. Not only are in-house equipment and software no longer required, but there are no associated costs for security, power and maintenance. All this, plus VDI hardware and software upgrades, are taken care of by DataLink and achieved without any sacrifice in system performance. Applications respond as fast from DataLink's Cloud as though they were being delivered onsite in the LMA office.

### Transformative Impact

"Adding desktops for new employees is now easier and faster," notes Charlie Shaw, CEO of Lara, May & Associates. "All that is required is a notification to DataLink and within an hour a new employee has all the tools needed to become instantly productive. The cloud has greatly improved how our financial advisors work and how we serve our clients. We couldn't be more pleased with our decision."



## HIGHLIGHTS

### CUSTOMER

Wealth Management Firm  
Offices in Virginia & Colorado

### SOLUTIONS

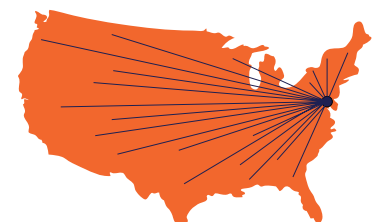
DataLink Cloud  
Virtual Desktop Infrastructure  
IT Management & Support

### KEY BENEFITS

Simplified IT Management  
Cost Savings – No Capital Expense  
Secure Environment  
Regulatory Compliance  
Easy Desktop Setup & Delivery  
24-hour Local Support

### COMPLETE COVERAGE

DataLink is based in Millersville, MD and supports clients' local, regional, and national locations.



We Make "IT" Easy