



## CUSTOMER STORY

# Searcy Financial Equips Its Advisors With Entreda's Cybersecurity Software



Win & Mac Devices

Filter Export

User	Computer Device	Cyber Risk #	Firewall	Peer-To-Peer	AntiVirus	Disk Encryption
Team Plan Demo	Win7Pro22H2_Symantec(10034)	770	PASS	PASS	WARNING	PASS
Team Plan Demo	SERVE(10097)	710	PASS	PASS	WARNING	N/A
Team Plan Demo	Kenys-MacBook-Pro-3023.local(2142)	650	FAIL	PASS	FAIL	FAIL
Team Plan Demo	WIN10PROKIMMHW(2350)	540	FAIL	PASS	FAIL	FAIL
Team Plan Demo	RobtPC1(2411)	720	PASS	PASS	WARNING	FAIL
Team Plan Demo	Kaz04ptm01(2408)	720	PASS	PASS	WARNING	FAIL
Team Plan Demo	RobtPC1(2291)	720	PASS	PASS	WARNING	FAIL

## Secure your business and mitigate risk with a unified cybersecurity and compliance platform

Searcy Financial Services is an independent financial planning and investment management firm located in the Kansas City suburb of Overland Park.

It manages assets for individual investors and their families, and employer-sponsored retirement plans nationwide. Searcy Financial Services wanted a comprehensive cybersecurity solution that would monitor all company-issued computers and mobile devices.

Jessica Maldonado is Vice President of Searcy Financial Services and has been with the firm since 2001. She is responsible for the firm's operations and takes cybersecurity very seriously. The company has a documented cybersecurity policy, but it was difficult to enforce. Jessica wanted to be alerted to specific non-compliance issues and cybersecurity threats so problems could be corrected immediately. After investigating a number of solutions, Jessica selected Entreda's Unify.

Alluding to Entreda's technical expertise and its insight into the challenges advisors face, Jessica sums up her reason for choosing Entreda, "Of all the firms that talk about cybersecurity, this firm actually gets it."

Searcy recently completed a company-wide rollout of Entreda's Unify real-time cybersecurity monitoring and remediation platform.



*"We are happy to be working with Entreda and they have saved us time and money."*

**Jessica Maldonado**  
Vice President  
Searcy Financial Services



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*“We implemented in 2015 and it’s been a good experience,” said Jessica. “In fact, right out of the gate, we discovered a few issues. We had a couple of machines that weren’t automatically updating for some reason, and one remote machine that was running out of memory.”*

Searcy is currently using Unify on about a dozen machines, both PCs and Macs. The company also plans to deploy Unify on all company-issued mobile devices. Jessica is pleased with the autoremediation feature which displays a pop up whenever an issue arises.

For example, a pop up might indicate that an advisor needs to log in to a secure VPN session to remediate an open public Wi-Fi. As an administrator, she gets a report showing when a pop up occurred and how it was handled, i.e., did the user remediate or ignore the notification.

She noted that from an end-user standpoint, since Unify runs in the background the advisors usually don't even notice it's there except that their login screen may look different or periodically they might get a pop-up remediation notification. A weekly summary report shows all of the company's devices and whether they meet key compliance requirements. The firm has made some specific changes in response to the reporting and Jessica feels that the weekly reports have been very helpful in catching glitches and issues that otherwise might have gone unnoticed.

Unify's comprehensive report details issues that need to be resolved and also lets her know when things are running normally. The report provides a list of devices visible within the office network, operating systems running on the machines, i.e., 32-bit or 64-bit, and the number of times Wi-Fi remediation was used or ignored. It also shows the settings on each device for screen lock, firewall, anti-virus, operating system updates and gives an inventory of all applications and processes running on the machine.

The report highlights week-to-week changes so she can see at a glance any new software running on a machine and determine if unauthorized programs need to be removed.



*“The Entreda team has been super responsive to all of our needs and they’ve been accommodating, as well, if we needed to shift an install for some reason,” said Jessica. “We are happy to be working with Entreda and they have saved us time and money. I can strongly recommend them without hesitation.”*



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