BULLETPROOF
a GLI company

Microsoft Solutions Partner

CASE STUDY

Beyond Investments

Strengthening IT & Security for a North American Financial Services Firm

The Client

An employee-owned financial services firm delivering discretionary investment management and advisory services to private clients, institutions, and family offices—built on long-term perspective, stability, and trust.

The Situation

Need for Enhanced Cybersecurity and IT Support

For a firm managing private wealth, privacy and security are paramount. Clients expect operations to remain discreet, seamless, and free from disruption—a cornerstone of trust in their services.

As the threat landscape evolved, the firm recognized the need for a proactive cybersecurity strategy to safeguard client assets and ensure uninterrupted service.

This realization led them to search for a new cybersecurity partner—one that could match their commitment to excellence and provide non-disruptive solutions to strengthen their IT security.

Finding the Right Partner

During the Request for Proposal (RFP) process, Bulletproof stood out with its energy, professionalism, and commitment to securing the client's business.

The decision was shaped by:

- Proven Microsoft security expertise and certifications
- Ability to unlock Microsoft funding and provide early access to new capabilities
- A flexible engagement model addressing long-term contract concerns
- Willingness to invest in the partnership through in-person collaboration and hands-on support

The Solution

Seamless Onboarding and Proactive Guidance

From the outset, Bulletproof provided a structured and prescriptive onboarding plan, using Microsoft methodologies and detailed playbooks to ensure a smooth transition.

The approach included:

- Microsoft security workload configuration and tuning
- Networking infrastructure upgrades to improve reliability and reduce downtime
- Governance processes tailored to the firm's compliance needs
- Proactive monitoring and SOC support for 24/7 protection

Bulletproof's expertise in Microsoft Azure Security was particularly valued, with precise, carefully managed security adjustments executed to the highest standards.

The Impact

Process and System Improvements

Upgraded network infrastructure improved operations, reduced downtime, and ensured uninterrupted client service.

Microsoft Partnership Advantages

Bulletproof's strong relationship with Microsoft provided access to funding, expert support, and early insights into innovations.

Institutional Confidence

Refined cybersecurity processes enabled the firm to confidently meet RFP requirements, ensuring compliance and safeguarding trust.

Enhanced Security Posture

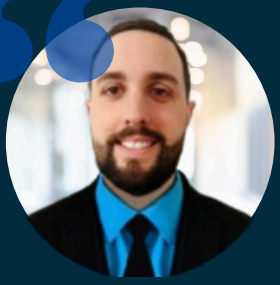
Advanced threat detection and strong security have made the firm safer and more reliable for its clients.

Time and Cost Savings

Vendor consolidation saved time and operational costs while increasing productivity and system reliability.

Today the firm utilizes these services:

- Managed IT Services, Bulletproof 365
- Managed Security Services, Bulletproof 365 Enterprise
- E5 Security Management
- Network Re-design of Firewalls, Switches, and APs
- Microsoft Secure Access Gateway Implementation
- Dedicated Project Manager to Assist with Managing Various IT Projects



By eliminating years of redundant data and implementing clear, precise policies, we ensured the firewall was not only secure but also easy to navigate in high-pressure situations.

Hearing the clients express their relief at finally having a properly configured system was especially rewarding. Their surprise at the smooth deployment of the first few firewalls—even on the initial try—spoke volumes about the impact of a thoughtful, clean approach.

Cody McNeill, Associate Network Architect, Professional Services at Bulletproof

The Conclusion

A Trusted Long-Term Partner

Bulletproof established a foundation of confidence and trust. by remining adaptable and transparent. The success of the initial engagement led to a multi-year agreement, expanding the scope to include Managed IT, Managed Security Services, and SOC support.

By aligning with the client's culture and delivering on its promises, Bulletproof has become a strategic partner in securing operations and enabling growth.

About Bulletproof

Bulletproof helps organizations face complexity with confidence. From securing data to modernizing IT and unlocking the full value of Microsoft technologies, we deliver practical, scalable solutions that drive measurable impact.

Our clients—spanning financial services, real estate, municipalities, enterprises, and more—choose Bulletproof for our deep expertise, people-first approach, and proven ability to turn goals into results.

Why Bulletproof

- Recognized on CRN's 2025 MSP 500 list
- Awarded 2024 MISA Security Trailblazer
- SOC 2 Type 2 compliant
- Long-standing Microsoft Solutions Partner