



EQUITY TRUST COMPANY SETS HIGH STANDARD FOR NETWORK, DATA, AND APPLICATION RELIABILITY TO PROTECT CUSTOMER CONFIDENCE



INDUSTRY
FINANCIAL SERVICES

LOCATION
WESTLAKE, OHIO

KEY CHALLENGES

- Deploy a scalable networking solution to support growth and innovation
- Safeguard customer trust, and meet or exceed compliance requirements
- Help ensure reliable access to data and applications, including cloud apps

SOLUTION

Equity Trust deployed VMware NSX Data Center and VMware NSX SD-WAN by VeloCloud to transform networking and security while protecting customer trust. A virtual cloud network approach provides pervasive connectivity and security, independent of underlying physical infrastructure, for a higher level of reliability.

BUSINESS BENEFITS

- Saved \$25,000 per hour with NSX SD-WAN when fiber cuts threatened connectivity for staff
- Yielded over \$500,000 in CapEx and OpEx savings, and avoided lost productivity costs
- Safeguarded consumer confidence with a safer environment for financial transactions

To earn continued customer confidence, Equity Trust Company transformed networking and security with VMware NSX® Data Center and VMware NSX SD-WAN by VeloCloud™, which along with VMware Horizon®, saved the company over \$500,000. A virtual cloud network model provides pervasive connectivity and security, independent of underlying physical infrastructure. This helps the company provide the higher level of service that customers demand in a competitive financial services environment.

Organization Overview

Equity Trust Company is a financial services firm that enables individual investors to diversify investment portfolios through alternative asset classes, including real estate, tax liens, private equity, precious metals, and digital currencies. With over 175,000 clients and \$25 billion under custody, it is one of the nation's largest self-directed IRA custodians.

The Challenge

Since its founding under a predecessor company in 1974, Equity Trust has grown into one of the nation's leading providers of investment custody and administrative services. Today, Equity Trust is transforming the industry and enabling clients to manage, purchase, and invest in digital currencies like Bitcoin, along with more traditional asset types, through its myEQUITY client access platform.

With system reliability and information security always a priority, Equity Trust needed an IT infrastructure that would keep up with the growth and evolution of its business. "Security is always first and foremost in anything we do. We needed a scalable solution to inspire consumer confidence, while meeting or exceeding compliance requirements. The solution also had to be easy to manage since we have a small team," said John Moses, former director of enterprise technology for Equity Trust.

The Solution

The company had already virtualized its data center with VMware vSphere® in recent years, reducing its hardware rack count by 64 percent. In addition, the company's call center workers and software developers use VMware Horizon virtual desktops, which are easy for the lean IT team to manage. When it came time to further upgrade its security infrastructure, Equity Trust selected VMware NSX Data Center for its ability to protect the network with micro-segmentation. To realize value quickly, the company participated in the VMware Network Virtualization Deploy Service for a rapid deployment, in addition to sending a staff member to NSX Ninja training.

“When a circuit in downtown Cleveland was cut close to our headquarters—and then another circuit went out that same day in another data center—NSX SD-WAN delivered a nearly seamless experience for our employees. Without it, we would have been down for a day and half, at cost of over \$25,000 per hour.”

JOHN MOSES
FORMER DIRECTOR, ENTERPRISE TECHNOLOGY
EQUITY TRUST

VMWARE FOOTPRINT

- VMware NSX SD-WAN by VeloCloud
- VMware NSX Data Center 6.3.3/6.4.1
- VMware vSphere 6.5 Enterprise
- VMware Horizon 7.5.1

APPLICATIONS VIRTUALIZED

- Microsoft Office
- IBM FileNet Content Manager
- Adobe software

PLATFORM

- Dell EMC servers and storage
- Palo Alto Networks firewalls
- Arista switches

“If you’re looking to quickly realize the value of improved security, then I would always engage the rapid deploy team for NSX. With the confidence we gained in the NSX Ninja program, we were able to make a swift transformation in our approach to protecting our environment,” said Moses.

To further extend a software-defined model across the cloud and to the WAN and the edge, the company chose VMware NSX SD-WAN by VeloCloud. With data centers in Ohio, Colorado, and South Dakota, Equity Trust leveraged multiple Dedicated Internet Access connections, including routers on site with traditional VPNs or MPLS. With NSX SD-WAN in place, Equity Trust was able to remove MPLS in the Colorado data center, in addition to eliminating a firewall platform, while helping ensure more secure, reliable access to software-as-a-service-based enterprise applications it uses, such as Salesforce and Microsoft Office 365.

Business Results & Benefits

Equity Trust’s network infrastructure transformation began to pay dividends almost immediately. When its operations saw geographically diverse fiber optic failures occur on the same day, the new solution proved immensely valuable, supporting continued availability of key cloud-based applications for more than 400 employees. “When a circuit in downtown Cleveland was cut close to our headquarters—and then another circuit went out that same day in another data center—NSX SD-WAN delivered a nearly seamless experience for our employees. Without it, we would have been down for a day and half, at cost of over \$25,000 per hour,” Moses said.

With NSX Data Center, Equity Trust has been able to eliminate physical load balancers and associated maintenance, for a savings of over \$150,000. By upgrading to vSphere 6.5, the IT team unlocks further efficiencies with an improved management console, making working with NSX even faster and easier. Business benefits extend to the confidence Equity Trust’s customers have in its services. “Our customers gain a higher level of assurance with us. Whether you’re buying digital assets like Bitcoin, real estate, precious metals, or other investments, our customers appreciate that we enable a more secure environment for their transactions,” said Moses.

Looking Ahead

Equity Trust recently started exploring public cloud possibilities and plans to expand aggressively into the cloud over the coming 18 months. The IT team feels its NSX solutions provide a strong foundation as it delves into serving its applications within a containerized approach. A strategy including the VMware Virtual Cloud Network model will help the company deliver services for applications and data with pervasive connectivity and security, independent of underlying physical infrastructure.

“Equity Trust continues to explore ways in which we can improve our technology platform to achieve an industry-leading experience for our customers. We look to technology partners like VMware to drive innovation, and Virtual Cloud Network is a great example of that. We can use this approach to future-proof our infrastructure architecture and achieve the agility and security required to be the best in the business,” Moses said.

