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CASE STUDY

From Fragmented Support to a True Partnership: How a NY Single Family Office Modernized Its IT with Omega Systems

When a New York-based single family office outgrew its previous IT provider, it needed a managed services partner who could deliver enterprise-grade cloud migration, cybersecurity, and 24x7 support without losing the responsiveness a smaller firm depends on. Here's how Omega Systems helped this financial services customer modernize its infrastructure, strengthen its security posture, and gain a dedicated support team it could actually reach.

This case study has been anonymized at the customer's request to protect the privacy and confidentiality of the financial services organization involved. Certain details have been modified or omitted to preserve the customer's anonymity.

Outgrowing a longtime IT provider

THE CHALLENGE

After more than 20 years in business, a New York-based single family office with 10 employees found itself outgrowing its longtime IT provider. When the firm's CFO stepped into the role in late 2024, one of his first priorities was reviewing where the company was spending money – and its managed IT services relationship stood out.

Support was billed hourly at inconsistent rates, with no clarity on whether a junior technician or a senior director was handling a given request. A quote to modernize the firm's infrastructure, including a long-overdue move off physical servers, came in much higher than expected. Before committing to a change, the CFO checked in informally with staff to gauge attachment to the incumbent provider. The response was lukewarm at best, and the firm began a formal search.

In search of a larger provider with personal feel

FINDING THE RIGHT FIT

The firm ran a full due diligence process, interviewing multiple managed service providers with financial services expertise. As part of that process, the CFO consulted an external advisor who was helping the firm evaluate outside partners across several areas of the business. When asked for an MSP recommendation, the advisor pointed the firm to Omega Systems.

According to the CFO, an early conversation with Omega's business development team reinforced that recommendation and gave the firm confidence it had found the right partner, one with the resources of a larger provider but without the impersonal feel that can come with scale.

> ***What stood out most with Omega was their level of attention. We have a dedicated point of contact who picks up the phone and escalates when something matters. As firms get bigger, that kind of personal attention tends to disappear. With Omega, it hasn't.***
>
> **– Jeff, CFO**

Omega Systems takes total ownership of IT and cybersecurity for financial services firms – one unified team, fully accountable, always responsive. From day-to-day support to an in-house SOC, we help customers run smoothly, securely, and with confidence.

A phased, guided approach

IMPLEMENTATION

The engagement began with a full SharePoint and Entra AD migration, a foundational step in moving the firm off legacy, on-premises infrastructure and onto a modern, cloud-based environment. For a family office without dedicated in-house IT leadership, the shift represented real risk: the CFO and his team needed to trust that file integrity and continuity would hold throughout the transition.

Omega's project management approach broke the migration into clear, well-communicated stages, with regular updates that let the CFO keep the firm's principals informed at every step. The result was a migration executed with care.

"Moving to the cloud felt like a big risk for a firm like ours. Omega's team broke it down step by step, kept our leadership informed the whole way, and made sure we didn't lose access or integrity of our files. They treated it with the care it deserved, and that gave us real confidence in the transition."

Protection for a distributed workforce

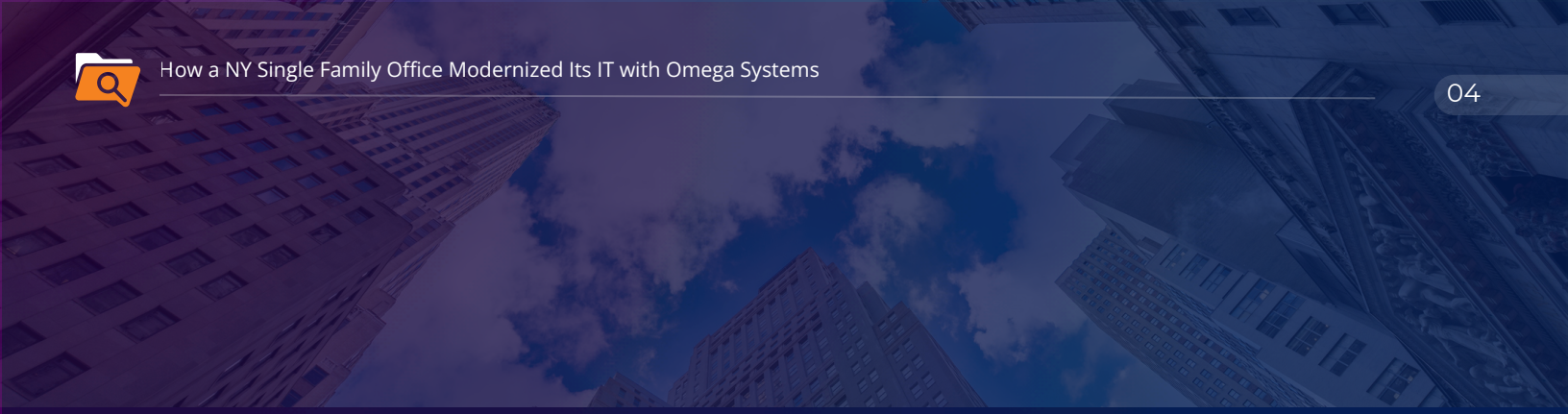
STRENGTHENING SECURITY

Beyond the cloud migration, the firm adopted managed Secure Access Service Edge (SASE) as a replacement for its traditional VPN. Previously, the firm had to rely on trust that employees were following secure connection practices while traveling or working remotely. Managed SASE closed that gap, giving leadership confidence that remote access is secure by design rather than by policy alone.



"Before, we had to trust that employees were following the right steps to connect securely while traveling. With managed SASE in place, we have real peace of mind that our team has secure access no matter where they're working from."

– Jeff, CFO



A modern, consolidated IT foundation

THE OUTCOME

Since partnering with Omega, this NY family office has moved from a fragmented, hourly-billed support model to a consolidated set of managed services under a single, predictable pricing structure. The firm's cloud-based environment has improved day-to-day efficiency and made remote work more seamless, while managed threat detection and response and SASE have strengthened its overall security posture.

The CFO also points to the relationship itself as a differentiator: a dedicated point of contact, consistent communication, and a project management style suited to a firm without dedicated in-house IT staff.

> ***Omega understands what family offices need from an IT partner. Their expertise, transparency and hands-on project management gave us confidence throughout the process, and they made even the technical aspects easy to navigate.***
>
> **– Jeff, CFO**

Omega Systems is an award-winning managed service provider providing trusted IT support, cybersecurity services and regulatory compliance expertise for family offices, RIAs and other investment advisory firms. Omega's proven track record consistently beats MSP industry benchmarks for call answer rate, customer satisfaction scores and other critical IT help desk metrics.

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