

“To say we were ‘thrilled’ with how FPA’s BDR solution came through is an understatement!”

Donald Gould - President and Chief Investment Officer



Business Before Technology™ - We Get IT!



# Case Study

## Investment Advisor Averts Major Infrastructure Damage and Costly Downtime with FPA’s Managed Services and Backup & Disaster Recovery Solution

### Background

Located in Claremont, California, Gould Asset Management, LLC is a unique registered investment advisor in that they pride themselves on their culture of superior personal service, ethical and trustworthy people, and innovative development and integration of custom software applications including their own Portfolio Information and Management System (PIMS). Gould Asset Management was founded in 1999 and oversees more than \$350 million in assets on behalf of individuals, families, endowments and foundations.

### The Situation

Instant access to information is critical to Gould Asset Management’s high quality management and administration of client portfolios. In early 2012 the firm was determined to ensure that they had a bullet-proof business continuity plan in place in case of a system failure or, worse yet – a disaster. They were also looking to improve the ongoing management of their internal technology systems. Turning to their trusted advisors for referrals, their custodian, Fidelity Investments, introduced FPA based on their knowledge of FPA’s long-term record of success with investment advisors. Gould partnered with FPA to take over the monitoring, maintenance, and management of their IT infrastructure. Initially, FPA conducted its proprietary *Network Health Assessment*, identifying key areas within Gould’s network that required remediation and, ultimately, implementing FPA’s *ManageIT* Network Monitoring and Maintenance program as well as FPA’s *Backup & Disaster Recovery (BDR) Solution*.

### The Challenge

Not two months later, FPA’s Network Operations Center (NOC) received an alert one evening indicating something was wrong. After confirming connectivity to Gould’s network was lost (indicating a bigger problem), it looked like Gould’s network was down. FPA’s NOC jumped into action, calling Gould’s office and emergency contact numbers to inform them of the problem. Suspecting a power outage had caused the alert, Don Gould personally went in to the office to assess the situation. When he opened the door he discovered that the ceiling had collapsed and the server room was flooded! After assessing the damage, 2 UPS units and 1 server were damaged beyond repair. The following details the timeline of events:

### Fast Facts

#### Gould Asset Management, LLC

Claremont, California  
www.gouldasset.com

#### Makeup:

- 3 Servers including (File, Exchange, and SQL Servers)
- 12 Workstations
- 5 PDA’s / Handhelds

#### Applications:

PIMS (Proprietary Portfolio and Information Management System), MS-Office, QuickBooks, Salesforce.com

#### Challenge:

- Increase network uptime
- Reduce ongoing IT support costs
- Improve business continuity capabilities
- Recover quickly in the event of a disaster

#### Solution:

- FPA’s Managed IT Services (*ManageIT* Service Level)
- FPA’s BDR Business Continuity Solution

Wednesday	
6:15 PM	FPA’s NOC responds to a Site Down Alert and notifies Gould via emergency contact process
8:45 PM	FPA’s NOC works with Gould remotely as they discover the flood damage (staying in phone contact during the response)
10:30 PM	Gould works with water remediation crew to dry the office and prep for turning the power on in the morning

Thursday	
8:00 AM	FPA’s NOC works with Gould to remotely power on servers and devices and determines that two UPS devices and the PIMS server are unusable
9:00 AM	FPA Project Manager arrives onsite and confirms that all devices but the PIMS server are operational
9:30 AM	FPA’s NOC begins fail-over process to virtualize the PIMS server on the BDR
10:00 AM	FPA and Gould confirm the PIMS server is fully functional on the BDR

# Case Study

## Investment Advisor Averts Major Infrastructure Damage and Costly Downtime with FPA's Managed Services and Backup & Disaster Recovery Solution (continued)

### The Solution

FPA's solutions are designed so that clients never have to worry about losing information or loss of access to critical systems again. While FPA's monitoring and response set the wheels in motion, it was the BDR that ultimately provided the true business continuity. In this case, a server that was damaged due to a flood was restored as a virtualized server in less than an hour, ensuring that Gould and their staff could continue to fully support their clients as effectively as ever.

### Benefits

The situation at Gould Asset Management is a "picture perfect" example of how a client should be protected from a disaster and how an effective managed service partner coupled with an effective and proven business continuity solution can be a life saver to a business.

#### Greater Reliability and Uptime That Minimizes Business Interruptions

For most businesses, including Gould's, preventing downtime is of the utmost importance. With FPA's monitoring capabilities, their Managed Services clients no longer have to worry about what is going on with their network. They know that FPA is watching it all and will advise as soon as something out of the ordinary happens. Most of the time, in fact, FPA will resolve issues even before the client knows something was wrong.

#### Increased Business Continuity and Reduced Risk

In the event of a hardware failure, Gould knows that they can get any one of their servers back up and running with a minimal amount of down time. And in the event of a major catastrophe, knowing that their servers are being backed up to the cloud adds an additional layer of protection to their business.

#### More Reliable, Flexible Backups

The longer life of FPA's disk-based backup increases reliability, reduces time to recovery and provides advanced backup features - including incremental backups (set to backup changes to the network servers every hour), the retention of the incremental changes since inception, and the ability to test and confirm the backups are accurate and complete daily - ensure that Gould is in the best business continuity position available.

#### Cost-Effective Solution

Because of FPA's scale, the cost to implement their *ManageIT* Managed Services and their Backup & Disaster Recovery solution are within reach of most small businesses making them a very cost effective solution – certainly less costly than any disaster would be – let alone the lost productivity and possibly lost business a disaster would have on a business.

#### Allows the Client to Focus on the Business (Not on Their Technology)

With FPA's Managed IT Services (*ManageIT* Service Level) and Backup & Disaster Recovery (BDR) solution in place, Gould Asset Management is able to focus on what they do best – managing their clients' investments. The 24/7 monitoring, proactive maintenance, and network management coupled with the increased protection of a complete on-premise and off-site backup and business continuity solution leads to peace of mind for Gould.

*"FPA's timely alert minimized the damage to our IT infrastructure. And just as important, the BDR kept our effective downtime to under two hours. Compared with the much more complicated backup and recovery plan that it replaced, the BDR saved us at least 24 hours. To say we were 'thrilled' with how FPA's BDR solution came through is an understatement!"*

**Donald Gould**  
President and Chief Investment Officer  
Gould Asset Management

### For More Information

For more information about FPA, visit [www.fpainc.com](http://www.fpainc.com) or [www.fpamanagedservices.com](http://www.fpamanagedservices.com) or call 818-501-3390.

### About FPA

FPA Technology Services, Inc. has provided outsourced IT services to growing businesses since 1991. With FPA's "business first" approach, FPA prides itself on being a trusted technology advisor helping clients leverage technology to achieve their business objectives.

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