

## Tempus Wealth Management Study

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### About Tempus Wealth Management

Tempus Wealth Management are a financial planning business located in Langstone Technology Park in Havant, Portsmouth who are regulated by the FCA. Tempus provide bespoke financial planning services, auto-enrolment for corporate clients and other professional services.

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### The Problem

The senior management team at Tempus approached Curatrix with a view to dealing with the following areas of concern:

- IT Support & Leadership Levels – The incumbent IT Support Provider was failing to meet the required basic level of support and was not providing the IT leadership needed from a growing highly regulated business.
  - Broadband - Tempus had also highlighted concerns around numerous service outages despite a failover SLA being in place. It was also noted that they were under provisioned in terms of Gbps and as such the office users mainly using cloud-based applications were struggling to get quick access.
  - VoIP / Mobile - Tempus had also highlighted concerns around their VoIP provider with the platforms inability to provide the functionality required to meet the FCA and MIFID II regulatory requirements. This functionality focused primarily around the ability to securely record, efficiently store and be able to easily recall calls made whether from a handset, or mobile.
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### Our Solution

After ascertaining the requirements for IVR, Call Queues, Voicemail and Mobile Phone integration we were able to deploy a compliant telephony solution which provided automatic Backup and Archive of the Call Recordings from the PBX that the customer would be able to access at any given moment. These recordings are retained within the Curatrix Technologies Backup Repositories, using NIST FIPS 140-2 Certified AES-256 encryption, ensuring compliance under MIFID II, Sarbanes Oxley (SOX), Basel II, General Data Protection Regulations (GDPR), US Health Insurance Portability and Accountability Act (HIPAA), Payment Card Industry Data Security Standard (PCI-DSS) and many more.

Directors of the business have made use of Bria Stretto, a Unified Communications front end with all the features of the enterprise PBX, including call recording, instant messaging to other Bria users and of course the ability to remain compliant with MiFID II when providing advice related to this Regulation.

To deliver the VoIP solution with the highest possible call quality and uptime, Curatrix have deployed fibre connections from our onsite Data Centre to within 10 metres of their offices, ensuring they receive a full 100Mbps resilient data service, directly into their office suite.



## Tempus Case Study

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### Why Curatrix Technologies?

Curatrix Technologies have improved the communications platform delivered for no additional cost, other than stored data for Call Recording Archive and improved data services over the incumbent Facilities Management company at Langstone Technology Park by ten times the original bandwidth for the same price.

**Curatrix has provided various facets of ICT support to Tempus including:**

- Office 365 Enterprise
- Advanced End-Point Security
- Fully Managed ICT Support
- Hosted VoIP platform
- Highly Redundant Internet Connectivity – 100 Mbps /100 Mbps
- Project advice and improvement
- Hardware Procurement Advice and Support
- SharePoint Setup Advice

### What Tempus say about Curatrix...

*“For regulatory purposes we had to be able to record telephone calls and retrieve recordings of calls where transactions were agreed. In order to do this we required an overhaul of our telephone system. This wasn’t something that our existing provider were able to assist with and on the grounds that we’d had a positive experience with the IT support, made the decision to move the phone system to Curatrix as well. The solution we were offered meets our needs and we know that we are in good hands should we require any further support.”*

Sarah Wheeler (General Manager)

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### The benefits Curatrix Technologies delivered

Curatrix Technologies provides managed Communications Services throughout Hampshire and the surrounding areas, having already built a reputation for quality services for other organisations at Langstone Technology Park it was an easy decision for Tempus to engage with us and to start discussing their telephony and internet connectivity requirements.

