



# Custom IT Infrastructure “Tighter Than Most Banks” for Small Investment Firm

## How BlueTie Built Enterprise-Grade Security and Compliance from Scratch for Milestones PVT Investment Advisors

When Mark Buscher and his team at Milestones PVT Investment Advisors launched their independent practice in the Rochester, NY area, they needed to build everything from scratch, including technology infrastructure. They chose to build a completely new IT environment designed specifically for their business needs, while at the same time meeting the highest technology standards. But managing sensitive financial data requires more than new equipment. It demands custom IT infrastructure, robust cybersecurity, and a partner who understands the unique challenges of boutique financial advisory firms.

### The Challenge

## Starting from Scratch

### KEY PROBLEMS TO SOLVE

Build a completely new, secure IT infrastructure from the ground up with no legacy constraints

Maintain full autonomy in selecting business applications instead of forced bundles

Ensure data security and regulatory compliance for financial information



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## The Action

# Custom Solutions Delivered

- Building and configuring secure technology stack designed for Milestones' workflow
- Implementing best-fit business applications chosen by the client
- Establishing robust cybersecurity measures tailored to security needs
- Creating reliable IT infrastructure designed to grow with the practice

## Partnership, Not Transactions



Rob's greatest asset is that not everything is a nail, and he's not a hammer. He works with you to come up with the right solution for what you're trying to achieve.

— **Mark Buscher**, Milestones PVT Investment Advisors

## The Results

# Secure Infrastructure, Lower Costs, Zero Breaches



### COST SAVINGS

Milestones saved thousands of dollars over the years compared to other managed solutions. By focusing on custom solutions tailored to their actual needs rather than inflexible pre-packaged offerings, many practices may actually reduce their annual technology costs when partnering with BlueTie. Flexible pricing meant paying for what they actually needed.



### NO SECURITY ISSUES OR BREACHES

Infrastructure verified as "tighter than most banks." Exceeds industry security standards for financial advisory firms.



### EXCELLENT UPTIME

Consistent reliability with minimal downtime or disruptions, ensuring uninterrupted service.



### RESPONSIVE SUPPORT

Direct access to Rob and his team with no ticket queues or waiting for large vendor support lines.

# What Mark Buscher Says

“ Rob’s greatest asset is that not everything is a nail, and he’s not a hammer. He works with you to come up with the right solution for what you’re trying to achieve. He’s a great problem-solver. Rob and his team are not intimidating. Even if you don’t understand the technical side, you never feel talked down to. His style makes it an easier and more comfortable dynamic to work with. He’s not salesy; you never feel like they’re imposing on you.

## Ready to Launch Your Independent Practice Without Technology Holding You Back?

Whether you’re leaving a larger firm to start a boutique financial advisory practice, transitioning to independence, or frustrated with generic solutions from large tech companies, BlueTie designs custom IT infrastructure and cybersecurity solutions tailored to your unique business needs.

We don’t sell pre-packaged systems. We build partnerships with financial advisors, accounting firms, law practices, and small businesses in the Rochester area and beyond.

**Schedule a Discovery Call today** and learn how BlueTie can design a secure IT environment built specifically for your independent practice.

