



**HALCYON**  
Financial Technology

innovative

reliable

responsive

distinctive

trustworthy

holistic

specialized

**Location**

San Francisco, CA

**Industry**

Investment banking  
Private equity

**What challenges did the business face prior to working with HFT?**

1. Recurring problems unique to the investment industry, such as complex SEC compliance requirements for a registered advisor.
2. Frequent technology reliability and performance issues impacting critical business processes.
3. High operational costs threatening the viability of the business.

**Why was HalcyonFT selected?**

1. Addressed core issues through thorough initial assessment, evaluation, and requirements validation.
2. Formulated and communicated a clear plan to improve infrastructure.
3. Demonstrated the highest level of integrity.
4. Experienced in helping similar firms implement solutions that meet the regulation and compliance requirements of a registered investment advisor.
5. Recommended the most effective hybrid cloud infrastructure to increase performance and reliability.



HalcyonFT helped us analyze various ways to cut costs so that we were able to emerge from our crisis in a very healthy way. It was really a testament to the way their team thinks about their clients. – CFO

**Benefits experienced working with HFT:**

1. Implemented solutions to meet compliance requirements of a registered advisor, including backup and recovery, email retention, and employee personal trading.
2. Built cost effective operations that run smoothly and efficiently, from planning, design, installation, and training, to ongoing maintenance.
3. Improved network and server reliability to increase efficiency of business processes.
4. Provided solutions that allowed executives to focus on the business rather than technology.
5. Solved problems quickly with extremely reliable and skillful service.



HalcyonFT was strategic in our success. I don't think we could have managed without them. Going with HalcyonFT was the best decision I have ever made as a CFO. – CFO

