

Top 5 Considerations for Migrating to the Cloud

Follow Along

@EzeCastleECI
#5CloudConsiderations

EzeCastle
INTEGRATION

Today's Speakers



Mary Beth Hamilton
Vice President, Marketing
Eze Castle Integration



Tim Macdonald
Product Manager
Eze Castle Integration

Follow Along

@EzeCastleECI
#5CloudConsiderations

EzeCastle
INTEGRATION

Webinar Details



- ➔ **How long? 30 minutes.**
- ➔ **Will the event be recorded? Yes.**
- ➔ **When will the recording/slides be available? 24-hours post-event.**
- ➔ **Where can I follow along?**

Follow Along

@EzeCastleECI
#5CloudConsiderations

EzeCastle
INTEGRATION

The Right Time

Office Relocation

- Ideal time to review
- Don't invest in moving outdated technology
- Migrate to cloud prior to relocation

New Applications

- Easy to add new applications (in hours)
- Long-term planning no more
- Predictable cost structure

Technology Refresh

- Conduct a cost-feature comparison for on-prem refresh vs. cloud
- With cloud, transition process is simple

Cloud FAQ

Q: For what other reasons are investment firms moving to the cloud?

Q: What do investors think of the cloud today?

Q: How are costs/budgets impacted by moving to a cloud infrastructure?

Q: How secure is the cloud?

Follow Along

@EzeCastleECI
#5CloudConsiderations

EzeCastle
INTEGRATION

Case Study: Beef Up Security



Private Equity Firm



\$1B+ AUM



30 Employees



Needs: Robust Security

The Requirements:

- Replace small IT vendor w/ limited remote support
- Enhanced security features
- Compliance with SEC cyber recommendations
- Complementary cyber services (policy development, etc.)

Follow Along

@EzeCastleECI
#5CloudConsiderations

EzeCastle
INTEGRATION

Case Study: Time to Outsource



NYC Investment Bank



\$5B+ AUM



100+ Employees



Needs: IT Refresh,
Cost Reduction

The Requirements:

- Fresh IT infrastructure due to legacy hardware
- Support of existing applications, including portfolio management and archiving
- Disaster recovery
- Improved user experience, simplified IT management

Follow Along

@EzeCastleECI
#5CloudConsiderations

EzeCastle
INTEGRATION

Case Study: Hello, OMS



Chicago Hedge Fund



\$300MM AUM



15 Employees



Needs: Order Mgmt

The Requirements:

- Redundancy throughout
- Ability to accommodate change/growth
- Performance equal or better to on-premise solution
- Management/monitoring 24x7x365
- Integration of existing FIX connectivity into new hosting environment

Follow Along

@EzeCastleECI
#5CloudConsiderations

EzeCastle
INTEGRATION

Top 5 Cloud Considerations

1

The Right Time

2

Budgeting/
Cost Containment

3

Features/
Value-Adds

4

Staffing/
Utilization

5

Security

Follow Along

@EzeCastleECI
#5CloudConsiderations

EzeCastle
INTEGRATION

Questions?



Mary Beth Hamilton

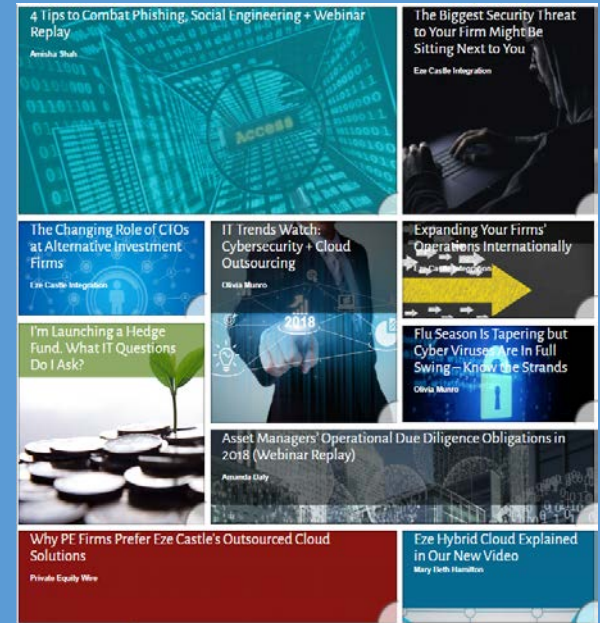
Vice President, Marketing
Eze Castle Integration
mhamilton@eci.com



Tim Macdonald

Product Manager
Eze Castle Integration
tmacdonald@eci.com

Subscribe for more
thought leadership



www.eci.com/blog

Follow Along

@EzeCastleECI
#5CloudConsiderations

EzeCastle
INTEGRATION