

CASE STUDY

Brown Harris WM | No Tech Stress, Just Smooth Days with Nortec

For this financial services firm, managing technology was outside their expertise and an increasing source of stress. They turned to Nortec for tailored IT solutions, 24/7 support, and the security and compliance required in the highly regulated securities industry.

CLIENT: Brown Harris Wealth Management



INDUSTRY: Financial Industry

LOCATION: Culpeper, VA

SERVICES: Retirement Planning, Insurance Review, Estate Planning and Analysis, Long Term Care Insurance, Education Savings-529 Plans, LPL Account View

About Brown Harris Wealth Management

Brown Harris Wealth Management is a Culpeper-based advisory firm focused on long-term financial planning. Known for their personal, client-first approach, they help individuals and families build, preserve, and protect wealth with care, trust, and attention to detail.

The Challenge

Before working with Nortec, the client relied on a retiring tech consultant and had no internal technology knowledge. This made it difficult to assess risks or plan for future needs. Key concerns included:

- Lack of internal tech expertise
- Uncertainty around cybersecurity
- No formal support structure for daily IT operations
- Growing compliance and regulatory requirements

They weren't just looking for new systems; they needed someone they could rely on to take ownership of their IT operations.

The Nortec Solution

We approached the engagement with care, professionalism, and strategy. We:

- Conducted a full assessment of the firm's existing technology infrastructure
- Worked alongside the retiring tech consultant to ensure a smooth transition
- Proposed tailored solutions specific to the firm's regulatory and operational needs
- Delivered a complete package including internal security, desktop and server management, firewall protection, and cloud solutions
- Ensured full compliance by coordinating directly with the corporate office and legal compliance team

Our approach wasn't one-size-fits-all. We created a custom strategy and implementation plan, ensuring every solution aligned with business goals and industry regulations.

The Result

Since partnering with Nortec, Brown Harris Wealth Management now has:

- A fully managed IT environment that operates smoothly every day
- Stronger cybersecurity, ensuring sensitive financial data is protected
- Regulatory compliance, thanks to Nortec's close coordination with legal and corporate stakeholders
- 24/7 support and monitoring, so the firm's team can focus on serving their clients
- True peace of mind, knowing they don't need to worry about technology anymore

What Brown Harris Wealth Management Says



"Nortec gives us peace of mind. Every morning when I walk into the office, everything just works—and I don't have to worry about it."

"Nortec built and implemented the solutions we needed to stay secure and compliant. They even worked directly with our corporate and compliance teams to ensure everything met federal standards."

"Communication was easy—calls, emails, and questions were all handled quickly, and I didn't have to get involved much. That's exactly what I needed."

Contact Us

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