



## AN INVESTMENT IN TRUE RELIABILITY

**tru** independence

**INDUSTRY**  
FINANCIAL SERVICES

**HEADQUARTERS**  
PORTLAND, OREGON

### CHALLENGES

- Improve bandwidth availability and utilization for financial applications
- Ensure low-impact failover to users in the event of a problem
- Reduce costs while increasing deployment agility

### RESULTS

- Aggregated bandwidth circuits to maximize utilization
- Gained redundancy and reliability over consumer-grade links for one-third the cost of business-class metro Ethernet connections
- Eliminated costs associated with multiple hardware devices

tru Independence relies on VMware SD-WAN™ by VeloCloud® for best-of-breed capabilities and a solution that “just works.”

tru Independence enables Registered Investment Advisors (RIAs) to create successful, independent advisory and wealth management firms with a best-in-class integrated service platform. The company’s services include business formation and analysis, compliance and broker protocols, office procurement, technology platform, and providing access to premier service providers, marketing, branding, and launch support. Applications supporting these services are delivered via private cloud to RIAs.

### Predictable Financial App Performance over Any Link

tru Independence operates its own private cloud data center, and from here, delivers Citrix XenDesktop, voice over IP (VoIP) telephony, videoconferencing, and other real-time financial applications to its clients. Reliability is critical, because clients monitor financial markets and make investment decisions that require responsive execution.

Each client site employs two Internet connections—usually cable and DSL links—for redundancy. A typical deployment might use a 100 Mbps primary link and a 20 Mbps secondary link as the backup. In the past, tru Independence used Dell SonicWall appliances to provide security and content control for each connection.

However, one connection sat idle most of the time, so tru Independence was paying for extra bandwidth that was rarely used. If the primary link did fail and traffic had to travel over the secondary link, there was a tremendous impact on application performance and end user productivity. In addition, the company had little visibility into network traffic unless it purchased a costly management solution to go with the SonicWall devices.

“We have to ensure that our clients don’t experience downtime,” said Paul Dalton, Chief Technology Officer at tru Independence. “If a problem occurs, we need visibility into network traffic so that we can intervene and remediate before users are affected.”

### A VMware SD-WAN Solution

Dalton wanted to eliminate potential points of failure between the company’s applications and its clients’ satisfaction—and expensive failover links were in his sights. He learned about VMware SD-WAN by VeloCloud from a colleague and tried it in-house before rolling it out to clients.

“Right away, it just worked. It was fast and easy to deploy. And we noticed a measurable increase in application performance, even if we failed a link over.”

PAUL DALTON  
CHIEF TECHNOLOGY OFFICER  
TRU INDEPENDENCE

---

“VMware SD-WAN is super scalable. We just build the template and quickly deploy to new clients as they come on board. As we grow, this capability will save hours and days of time.”

PAUL DALTON  
CHIEF TECHNOLOGY OFFICER  
TRU INDEPENDENCE

---

VMware SD-WAN simplifies branch office networking while assuring optimal application performance. By separating control plane and data plane layers, VMware SD-WAN moves intelligence from the data plane into the programmable control plane for greater agility. The VMware SD-WAN architecture also operates across any combination of public or private circuits, making it ideal for multiple clients in locations with diverse Internet connectivity links.

### VMware SD-WAN Works Better

VMware SD-WAN’s Internet bonding feature allows Dalton to economically increase bandwidth by aggregating WAN circuits of any type, providing faster response even for single application flows. At the same time, application-aware, per-packet link steering and on-demand remediation enable optimal performance for demanding, real-time voice and video over any transport.

“VMware SD-WAN fit the bill perfectly,” said Dalton, “and it gives us better redundancy. If a primary connection goes down, there is far less impact to end users because of the link optimization. We can just deploy it and forget about it.”

### Optimizing Budget as Well as Bandwidth

tru Independence found VMware SD-WAN to be highly cost-effective. There are no hardware appliances to purchase, maintain, or upgrade. They don’t need dual devices to handle two Internet connections, and they also can use less-costly links and optimize them. For example, the company can deploy cable and DSL links for one-third the cost of metro Ethernet connections to each client and deliver outstanding reliability and performance.

### Simpler to Manage

Dalton says that they now can configure everything remotely for clients, eliminating the need to travel to a client’s physical location to deploy it. He also can monitor each site and see across all deployed locations from a central management point.

“I haven’t had to do any troubleshooting—which in itself is a huge plus,” he said. “I occasionally check in and see traffic running as we expect.” He adds, “It’s nice to have this kind of partnership. We rely on VMware SD-WAN for best-of-breed capabilities and a solution that just works.”

