



WE GET

FINANCIAL SERVICES

See how we can help you orchestrate an IT strategy to mitigate risk, transform the customer experience and drive data insights.

DEPOSITORY INSTITUTIONS | CAPITAL MARKETS | INSURANCE





EMBRACING THE NEW FINANCIAL SERVICES DISRUPTION

The financial services industry is being challenged with the need to innovate the way services are delivered, embrace analytics to drive more personalized experiences and protect against unprecedented security challenges. Not to mention navigating complex merger and acquisition (M&A) opportunities that increase business value and growth, without disrupting the customer experience. All the while operating within an evolving regulatory environment.

That's why we offer you the solutions and support you need to embrace the latest industry trends and technology initiatives, including transforming the customer experience, addressing data privacy compliance and improving data management with AI. We can advise you on how to select the best partners, solutions and services to help you reach your business goals.

CDW WORKS WITH MORE THAN 12,700 DEPOSITORY INSTITUTIONS, CAPITAL MARKETS FIRMS AND SPECIALTY SERVICE COMPANIES:

- Supports 99% of the top U.S. banks
- Supports 55% of the top U.S. credit unions
- Supports more than 7,500 U.S. capital markets firms
- 75+ dedicated CDW Financial Services account managers

WHAT ARE THE TOP STRATEGIC PRIORITIES FOR FINANCIAL INSTITUTIONS?

84% improve digital experience for customers

42% enhance data analytics capabilities

32% reduce operating costs

31% improve innovation culture

28% digitize back-office operations

Source: thefinancialbrand.com, Top 10 Retail Banking Trends for 2019, January 7, 2019

COMPREHENSIVE FINANCIAL SERVICES EXPERTISE

Whether you're looking to upgrade your security framework to address new data privacy regulations, break down data silos with the power of AI and machine learning tools, improve the customer experience in the branch or assess IT compatibility during a merger or acquisition, CDW Financial Services can help. Our dedicated financial services account managers and specialized solution architects understand the most advanced technology that can help you balance business and regulatory priorities and security controls with innovation to help you thrive in a highly competitive environment.

WE GET FINANCIAL SERVICES

We've helped over 12,700 depository institutions, capital markets and specialty financial services companies address their IT challenges for more than 30 years. So we understand the nuances of leveraging technology in the bank or credit union, on the trading floor or within an insurance firm. And because we're a leading technology solutions provider in the industries we service, we give you access to 1,000+ brands and 100,000+ products to ensure you get the most out of your IT investment.



Compliance and
Risk Management



Data Analytics with AI
and Machine Learning



Customer
Experience



M&A



WE GET BANKS

Customer expectations for secure, personalized, anywhere-anytime banking have made transforming core business processes and embracing a faster pace of innovation more critical than ever. Addressing the data challenge through the use of AI and machine learning tools will help banks uncover valuable customer insights and drive more personalized experiences. Upgrading security frameworks can lock down advanced security threats and help banks meet new data privacy regulations, like GDPR. And positive market factors like tax reform, interest rates and pro-business regulations will continue to drive continued bank M&A activity. Let CDW Financial Services experts help you ease the technology load with our in-depth industry knowledge and comprehensive IT solutions.

- 92%** of executives in financial services and other industries surveyed are increasing their pace in investment in Big Data and AI
- 62%** have already seen measurable results from their investments in Big Data and AI
- 48%** say their organization competes on data and analytics

Source: newvantage.com, "Data and Innovation: How Big Data and AI Are Accelerating Business Transformation," 2019

WE GET CREDIT UNIONS

A seamless digital experience is the expectation of every single member. But today, that's not enough. Members expect a more personalized digital experience that only advanced data analytics can provide. Which makes updating and transforming legacy systems and IT infrastructure a critical step in the digital transformation journey. Likewise, federal regulatory bodies, like the National Credit Union Administration, are stepping up the pressure on credit unions to lock down security frameworks. CDW Financial Services experts can help you find the right solutions to compete in the digital economy, build member loyalty and clear critical regulatory and security hurdles.



Source: cutimes.com, "Many Credit Unions with No Clear Data Analytics Strategy: BIG Survey," November 16, 2018

WE GET CAPITAL MARKETS

Improving the client experience in every aspect of the business is critical for success. So is leveraging powerful technology to efficiently aggregate, analyze and interpret data for better decision-making and insights. Add on the pressure to drive constant innovation, cost efficiency, regulatory compliance and nontraditional competitors. Let CDW Financial Services help you relieve the pressure and find the most advanced high-performance technologies and solutions that will keep you on the leading edge of the industry.

3/4 of capital markets CEOs say deploying emerging technologies will separate high-performing firms from average-performing firms.

More than 90% believe AI will significantly change how they do business in the next five years.

CEOs are counting on technology to deliver seamless interactions with customers, valuable new insights about their brands and markets, and more tailored and targeted products and services.

Source: pwc.com, "Banking and capital markets trends 2019"

WE GET INSURANCE

Upgrading antiquated customer experiences is a top priority but legacy systems hold you back. You need the tools to access deeper customer insights, analyze risk, fraud, potential catastrophe, variable annuity modeling and drive innovation. All while keeping a close eye on costs. We know that's a lot for any IT team to handle. CDW Financial Services can help you build an IT infrastructure that supports even the most complex analysis and modeling.

Nearly half of global insurance business technology decision-makers and influencers cited improving customer experience as a top business priority

43% indicated that improving their innovation capabilities (customer experience and business efficiency) would be top of mind for their firms

Source: forrester.com, "The Three Key Actions that Will Define Insurance Tech Investment in 2019," January 31, 2019





SOLUTION: REGULATORY COMPLIANCE AND RISK MANAGEMENT

WE GET THE IMPORTANCE OF MITIGATING COMPLIANCE AND SECURITY RISKS

Complicated regulations, strict compliance requirements and evolving cyberthreats create significant risk for depository institutions, capital markets firms and insurance firms. A comprehensive cybersecurity solution helps your firm better manage risk and comply with regulatory mandates by deploying the most advanced technology, which helps protect your enterprise and your customers/members/clients against internal and external threats in a cost-effective way.

- **Uncover risks.** With assessments and testing that include security and vulnerability assessments, penetration testing, external perimeter testing, internal and wireless assessment and compliance gap analysis.
- **End-to-end security.** Understand which people and devices are accessing your network – and what they're doing when they get there. Next-generation firewalls and unified threat management, IDS/IPS, security information and event management, email and web security, advanced malware protection and network access control and authentication make sure your infrastructure is lock tight.
- **Data loss prevention.** Protect sensitive data in use, in motion and at rest with endpoint protection and encryption.
- **Mobile security.** Enable employees to securely connect whenever and wherever they want with network access control, authentication, VPN architecture and mobile device management.
- **Security as a Service.** Cloud-based security versus on-premises solutions include endpoint protection, hosted email and web security.

CUSTOMER SNAPSHOT

HOME LOAN AND REFINANCE PROVIDER MEETS NEW CYBERSECURITY REGULATIONS AND SHORES UP SECURITY FRAMEWORK GAPS

A Chicago-based home loan and refinance provider with locations in New York was required to comply with the New York Department of Financial Services 23 NYCRR 500 cybersecurity regulation. Part of the regulation required the customer to employ a CISO, which it did not at the time that the regulation was introduced. The customer trusted CDW to assist in meeting NYCRR 500 requirements, based on previous expertise helping other financial services organizations address the regulation. This included introducing the customer to different virtual CISO (vCISO) options and outlining how the vCISO would help meet various components of the NYCRR 500 regulation. Since the onboarding, the customer's vCISO has participated in follow-up security meetings hosted by CDW. The CDW team has also worked hand in hand with the customer to identify other gaps within its security posture, which has led to opportunities to upgrade its security framework including the installation of next-generation firewalls.



SOLUTION:

MACHINE LEARNING – HARNESS BIG DATA WITH AI

WE GET HOW TO TURN BIG DATA INTO SMART DATA

Advanced analytics power financial services organizations to new levels of competitive success. CDW Financial Services can help you turn Big Data into smart data by tapping the power of AI, machine learning and powerful analytics systems to break down data silos, predict customer behavior, reduce risk and find new areas of business growth. Specific solutions include software platform, hardware components and implementation and configuration services.

- **Artificial intelligence.** Get deeper insights into customer needs, wants, habits, risks and more. Culling valuable information from structured and unstructured data.
- **Machine learning software.** The brains behind the hardware. Your team will generate more models, more accurately, than traditional analytical and programming approaches with real-time analysis and decision-making for powerful insights, increased efficiency and reduced costs.



Over 50%

of financial services CEOs believe artificial intelligence (AI) will have a bigger impact than the internet. Getting the balance right between tasks performed by AI and tasks performed by people will be key to future success for financial institutions.

Source: globenewswire.com, "Traditional Cost-Cutting Measures Aren't Enough to Solve Current Profitability Crisis in Financial Services Industry," February 5, 2019



SOLUTION:

DRIVE VALUE FROM YOUR DATA WITH AI

WE GET AI FOR HIGH-PERFORMANCE COMPUTING

AI driven by high-performance computing is opening a new frontier for financial services. Combining deep thinking and machine learning with powerful supercomputing can help automate complex tasks and decision-making processes for every segment of the industry. Whether you need to power up analytics and processing, better manage data volumes and compliance reporting or increase profitability, we can recommend the right HPC solution or service for you.

- **Fraud detection.** Use AI technology to harness data, machine learning and supercomputing to monitor millions of financial transactions and uncover fraudulent behavior.
- **Ultrafast processors.** Reduce latency from microseconds to nanoseconds.
- **Network optimization.** Improve performance and traffic flow of critical applications, and increase speed, quality of service and security. Solutions include WAN/application optimization, next-generation networking, wired and wireless.
- **Server optimization.** Run multiple virtual operating systems and applications independently on a single machine. Experience continuous uptime, dynamic load balancing and resource allocation. Form factor options include blade racks and tower servers.
- **Data storage/management.** Create a powerful platform for managing structured and unstructured data. Streamline data retention policies and design a flexible, secure and easy-to-manage data storage blueprint. Specific solutions: Direct-attached storage (DAS), Network-attached storage (NAS), Storage area network (SAN), Unified storage, Software-defined storage (SDS), Object storage software, Flash storage and Hierarchical storage management.
- **Cloud.** Scalable, flexible and easily expandable to meet changing needs. Integrates data from multiple sources, helping to drive effective analytics.



“Customer intelligence will be the most important predictor of revenue growth and profitability.”

Source: pwc.com, “Financial Services Technology 2020 and Beyond: Embracing Disruption,” 2016



SOLUTION: TRANSFORM THE CUSTOMER EXPERIENCE

WE GET THE VALUE OF A SUPERIOR CUSTOMER EXPERIENCE

Meeting customer demands for 24/7 access, personalized engagement and seamless interaction across every touch-point requires a scalable and dynamic IT infrastructure. We can help you choose the right IT solutions to build an exceptional customer experience.

- **Branch.** Power up your branch to help solve customers' more complex transactions. Provide end-to-end service via bankers with mobile devices. Remote experts enabled by videoconferencing solutions. Digital signage and self-service kiosks to streamline the customer experience. Solutions include digital signage and content management, telepresence, beacons, videoconferencing/collaboration tools, self-service kiosks, desktops and displays, and mobile technology.
- **Online.** Assist customers 24/7 using web-based access to the information and transactions they wish to make at the right time and location for them. Provide seamless messaging — email, video and IM/presence — with content sharing. Solutions include desktops and notebooks, mobile technology, source web-based access and wireless networking.
- **Mobility/collaboration.** CDW experts can help you assess, design and optimize your wireless network platform, then select and activate the mobile devices that will meet the needs of your staff, customers and even their customers. Solutions include mobile technology (smartphones, tablets), ATM, mobile app development and wireless networking.
- **Contact center.** Traditional call centers are maturing into multimodal customer engagement centers (CECs) that support phone, web chat, email and mobile text communications. Solutions include unified communications tools (voice, email, chat, video), software solutions (CRM, analytics), telephony, desktops and displays.
- **Legacy Ecosystem Transformation/IT Infrastructure.** The legacy ecosystem has become the biggest barrier to delivering a satisfying omnichannel experience. Transform your IT infrastructure with the right servers, network switches, hard drives, storage networking and virtualization solutions that are secure and compliant to deliver customers and members with a perfect experience every time, no matter what channel they choose.

SOLUTIONS:

IT SUPPORT FOR MERGERS AND ACQUISITIONS

WE GET MERGERS AND ACQUISITIONS

Mergers and acquisitions are complex processes that impact business processes, people and technology. IT compatibility, IT infrastructure longevity and overall IT security are all crucial for success. CDW Financial Services can support your organization through every phase of the M&A journey.

- **Project management and consulting.** Our Consultative Advisory Services provide counsel and project management on IT direction, process improvement, governance and cloud technology, IT operations and business continuity.
- **Software asset management.** We can execute a Total Software Management solution that covers contract management and all your unique software needs.
- **Security assessment.** CDW's Information Security solutions can perform risk assessments, policy and procedure compliance reviews, and application assessments.
- **Solutions.** We design, implement and manage customized services and solutions for organizations big and small, focusing on the nuances of IT so you can focus on your M&A.
- **Managed services.** We can help you manage your most complex infrastructure and applications with holistic, secure solutions that meet your needs and budget.



CUSTOMER SNAPSHOT

FINANCIAL MARKET COMPANY STREAMLINES M&A IT INTEGRATION

After completing an acquisition that would expand its footprint globally, an American financial market company realized that the scope and demand of the IT integration would be sprawling. CDW held preliminary conversations with the customer to understand the full scope of the integration and each of the roles involved. Working with an international team, CDW gained a thorough understanding of what was needed to expand the customer's data centers into six new countries and expand its domestic data centers in the U.S. CDW developed a global plan to roll out the data centers, including outfitting each location with compute, networking and storage equipment. In addition, CDW managed the global implementation of equipment and storage arrays in each country.

DEDICATED EXPERTS

CDW Financial Services' committed team of experts take the time to listen and understand your business and will help you achieve your IT goals.

- **An account manager** who understands the nuances of the financial industry will be there to address the specific needs of your organization.
- **Our solution architects**, highly certified professionals with extensive industry experience, offer expertise in designing customized solutions.
- **Our advanced technology engineers** assist you with implementation and long-term management.

WHO WE ARE

- Highly certified IT solutions provider
- Experts with unparalleled depth and breadth of knowledge
- Strategic partner to recognized industry leaders
- Consistent recipient of industry partnership awards

WHAT WE DO

- Listen carefully to understand your organization's needs, goals and budget
- Provide you with a clear view of all of your solution options
- Help you to choose the best-fit solution for your needs
- Assist you at any and all stages, from inquiry to implementation

HOW WE DO IT

- Account teams dedicated to your organization
- Expert pre-sales solution architects
- Assessment teams to assist you onsite or offsite
- More than 700 certified engineers

PEOPLE WHO GET IT

ADVICE FROM AN EXPERT

Scott Hiemstra, Manager
CDW Financial Services

Building a foundation of trust

We want our customers to know that they can count on us, and that we're experienced in working with financial organizations that have similar technology challenges.

We start every customer collaboration by gaining an in-depth understanding and review of the customer's IT infrastructure, asking questions like:

- What are the organization's business objectives for the year?
- How will you use the technology to accomplish the business objectives for the year?
- What is the staffing/foundation, IT, development, support?
- How bleeding-edge do you want your technology?

Our goal is to continuously deliver new ideas and innovation to our customers. CDW has the pulse of the technology industry and understands the needs of financial service institutions. This combination of knowledge and experience helps us deliver the right solution with the best technology and service, to protect financial services organizations' technology investments for today – and long into the future.

CDW'S FULL-TIME TECHNOLOGY SPECIALIST STAFF INCLUDES:

- Certified Cisco Engineers (61 CCIEs, 6 double CCIEs, 3 triple CCIEs and 1 quadruple CCIE)
- Certified Novell Netware Engineers (CNEs)
- Microsoft Certified Systems Engineers (MCSEs)
- 211 professional-level certifications (156 CCNP, 103 CCNP-V, 10 CCNP-SEC, 12 CCNPW, 6 CCSP, 59 CCDP, 4 CCIP)
- 316 associate-level certifications (296 CCNA, 135 CCDA, 91 CCNA-V, 35 CCNA-SEC, 31 CCNA-WL, 13 CCNA-DC, 3 CCNA-VID)
- 491 CSEs



WE GET SERVICES & SUPPORT

We understand you need more than technology – you need a partner who can provide knowledgeable guidance, respond quickly to your questions and help maintain your hardware and software for optimal performance. You can work closely with your dedicated CDW Financial Services account manager to access our broad spectrum of services. Our goal is to help you maximize ROI and ensure your technology investment continues to add value to your organization well into the future.

ASSESSMENT/PLANNING/DESIGN:

Assessments provide the foundation for an effective IT strategy. CDW Financial Services technology specialists consult and collaborate with your team to evaluate your existing infrastructure and help ensure it can grow with your expanding technology requirements.

CONFIGURATION:

We can customize your technology solutions to your precise specifications in CDW's Configuration Centers – from simple installations and device activation to highly complex network operation system installation and enterprise configurations.

INSTALLATION/DEPLOYMENT:

Our installation services ensure your new technology is up and running as fast as possible. An engineer can be onsite to help you with all facets of installation, making sure your technology is connected and working properly, and that all components are talking to your network.

PRODUCT LIFECYCLE SUPPORT:

If you're resource-strapped, CDW Financial Services can offer your IT team extra support through onsite staffing and training. We also can help protect the life span of your technology with maintenance contracts and, when the end is near, provide proper asset disposal.

24,000_{FT²}

CONFIGURATION CENTER
WHERE QUALIFIED TECHNICIANS
CONFIGURE UP TO **3,500 CUSTOM**
CONFIGURATIONS IN 24 HOURS



DATA CENTER LOCATIONS



ABILITY TO DO ONSITE
ASSESSMENTS AND
IMPLEMENTATIONS
ACROSS THE COUNTRY



STATE-OF-THE-ART
DISTRIBUTION CENTERS
WITH MORE THAN **1 MILLION**
SQUARE FEET



ISO 9001:2000
CERTIFICATION



HOSTING AND MANAGED SERVICES:

Efficient and economical, we can protect your operations with a full range of services, whether your technology is located on your premises or in our Enterprise Hosting Center.

CUSTOMER RELATIONS:

You can contact our customer relations staff directly or through your account manager to resolve problems. Customer Relations' standard hours are 7 a.m. to 9 p.m., Monday through Friday. They also track lost packages, submit claims to carriers, handle return merchandise authorizations (RMAs), and send out replacements for damaged or defective products.

TOLL-FREE TECHNICAL SUPPORT:

CDW's 24/7/365 U.S.-based toll-free technical support help line is staffed by Level One associates who are CompTIA-certified and hold, at a minimum, A+ and Network+ certifications. Our average call-to-answer is less than 60 seconds and we offer support for computers, peripherals and operating systems for five years from their date of purchase.

ONLINE SUPPORT:

CDW's online support – including live chat – is available through your own personalized My Account feature on CDW.com, which provides 24/7/365 access to your latest order and purchase information and the real-time status of your account team.

CDW FINANCIAL SERVICES BREADTH OF PARTNERSHIPS

Today, IT creates business potential, drives growth and innovation, but it's not always easy to stay up on the latest IT advances when you carry a heavy load. We get it. CDW Financial Services partners with the industry's leading technology companies to bring you the state-of-the-art IT solutions you need to succeed and lighten your load.

Like the conductor of an orchestra bringing together different instruments, we work with over 1,000 leading and emerging partners to make sure you get the right solution. That's the power of IT Orchestration by CDW™.

BizTech magazine, published by CDW, explores technology and business issues that senior IT leaders and business managers face when they're evaluating and implementing a solution.

PRIMARY TECHNOLOGY PARTNERS





Whatever your financial services organization's technology goals are, CDW Financial Services is here to help you achieve them.

If you have any questions or are ready to begin transforming IT across your financial services ecosystem, contact your CDW account manager or visit [CDW.com/finance](https://www.cdw.com/finance) today.





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