

RIA WorkSpace vs Visory

Securing the right IT partner for your RIA

RIA WorkSpace :

RIA WorkSpace specializes in managed IT services tailored specifically for RIA and financial advisory firms. Our platform, powered by Microsoft, delivers comprehensive IT management, cloud services, IT compliance, and enterprise-level cybersecurity designed for the unique needs of wealth management professionals.

Visory :

Visory offers a wide range of managed IT services, including cybersecurity and cloud solutions, aimed at helping businesses streamline their technology operations. They focus on services for wealth management, accounting firms, construction companies, and other small and mid-sized businesses.

| | RIA WorkSpace | Visory |
|---------------------------------|------------------------------|--------|
| Assigned Team | ✓ Yes | ? |
| Primary Support Engineer | ✓ Yes | ? |
| Technical Account Manager | ✓ Yes | ✓ Yes |
| Exclusively focused on RIAs | ✓ Yes | ✗ No |
| Proactive Consulting | ✓ Yes | ? |
| Owned by a private equity firm | ✗ No | ✓ Yes |
| Employee Retention | 93% | ? |
| Client Retention | 96% | ? |
| Customer Satisfaction Score | 98% | ? |
| Google 5 Star Rating | 4.9 ★★★★★ | None |
| Transparent Billing and Pricing | \$155 per employee per month | ? |