

Mortgage Investment Firm Takes a Proactive Approach to Protecting PII and Addressing Privacy Regulations Using Virtru

A US-based investment management firm that specializes in real estate backed loans and securities needed a solution to protect clients' sensitive data throughout financial transactions. Leveraged alongside Microsoft Outlook, Virtru ultimately helped the firm take an innovative approach to protecting PII and maintaining privacy.

A Firm-Wide Integration

The firm uses Virtru company-wide to protect personal data not just for compliance but also because client privacy is a responsibility they don't take lightly. Knowing that at some point, everyone in the firm encounters sensitive data—such as mortgage information, financial documents, details for a wire transfer from the accounting team, or external communications with investors—they realized they needed a data protection tool that provides access controls, such as the ability to recall a message if sent by mistake, message expiration, and ease of use that minimizes burdens on their tech support team.

When evaluating data protection tools and testing Virtru, ease-of-use was one of their top requirements. Once the leadership team saw how easy it was to toggle Virtru on or off within Outlook, they were sold. Now, every single person in the firm uses it anytime they share sensitive data via email.

Virtru Helps Address Industry Data Protection and Compliance Concerns

With over 30% of their business in California, compliance with the [California Consumer Privacy Act](#) (CCPA) was also a top concern. The firm needed a tool that would protect sensitive data in accordance with current privacy regulations, such as the [General Data Protection Regulation](#) (GDPR) and the CCPA. But also, as more state-led privacy regulations are on the way, they needed a future-proof solution. With Virtru, the firm is confident that it can both adequately protect clients' sensitive data in full compliance with current regulations and meet future regulatory requirements tomorrow.

In fact, the firm views this innovative approach to privacy and PII protection as good for business. Investors know that they can trust the firm to take necessary steps to protect their data—regardless of whether they are currently covered by privacy regulations—and as a result, the firm has seen an increase in loyalty from clients all around the world.

Data Protection and Privacy for a Competitive Advantage

The financial industry is particularly susceptible to attack because of the prevalence of sensitive data throughout financial workflows, but with Virtru's unmatched ease of use, the organization can rest assured that clients' and partners' most sensitive data is protected, even in the event of a breach. To illustrate the ease of use, Virtru is leveraged as a selling point with clients and business counterparts simply by sharing sensitive information with them via Virtru. Ultimately, this works to provide peace of mind for clients and business partners, and a competitive advantage for the firm.

Through their proactive approach to maintaining the privacy of sensitive data, the firm is not only successful in winning new business but is also better positioned for future success. With Virtru, they're assured that their security investments will meet requirements for GDPR and CCPA compliance while also providing the tools and processes in place to help meet future regulatory requirements from other states. ●

**For more information on how Virtru can accelerate your privacy program
by protecting sensitive data and preventing unauthorized access,
please get in touch with us. virtru.com/contact-us**



At Virtru, we empower organizations to easily unlock the power of data while maintaining control, everywhere it's stored and shared. Creators of TDF (Trusted Data Format), the open industry standard for persistent data protection, Virtru provides flexible, easy to use, and trusted privacy technologies built on its data protection platform that govern access to data throughout its full lifecycle—from creation to transmission, storage, analysis, and sharing. More than 20,000 organizations of every size and industry trust Virtru for data security and privacy protection. For more information, visit virtru.com or follow us on Twitter at [@virtruprivacy](https://twitter.com/virtruprivacy).