Case Study

SaaS provider **leaf**planner uses ShardSecure to protect high-net-worth family data

Family wealth platform seeks privacy and protection for valuable data

leafplanner's software platform enables its high-net-worth customers to prepare for the future by engaging, educating, and empowering family members and advisors. With over three decades of wealth advisory and risk management expertise, **leaf**planner helps its clients apply a family office lens to the collection, organization, and mapping of family and family enterprise information. Its software solution creates a dynamic repository of knowledge about estates, assets, and business relationships, creating an efficient and comprehensive succession of information for families of wealth.

Advanced data privacy

Because of the sensitive nature of **leaf**planner's client information, data privacy is of the utmost concern. The company aggregates crucial documents like trusts, wills, and passports as well as information ranging from complex assets to streaming service passwords. Collectively, these confidential documents paint a highly detailed picture of a family's personal affairs, making them a valuable target for cyber attackers.

Concerned customers

The company needed to earn their clients' trust by going above and beyond standard data privacy technology. Most high-net-worth families operate with a high focus on anonymity and are well versed on cyberthreats by their security teams.

Run-of-the-mill privacy measures like MFA and encryption are the bare minimum and would not suffice for most of these clients.

Easy SaaS integration

Finally, **leaf**planner needed to seamlessly integrate the security solution with their existing SaaS application. One of their differentiators is ease of use, so the company wanted to make sure that the process of adding and updating family information remained smooth for clients.

To gain a competitive advantage, earn their clients' trust, and ensure advanced data privacy,

SHARDSECURE PROTECTS SENSITIVE DATA FOR LEAFPLANNER'S CLIENTS

- Passports, driver licenses, and other ID cards
- Details of real estate and other complex assets
- Investment partnership information
- Brokerage information
- Club memberships
- Lawncare, catering, and other home vendor information

leafplanner partnered with ShardSecure to improve data security and confidentiality for existing clients and eliminate privacy concerns for new customer acquisition.

Protecting sensitive client data with ShardSecure

As part of their defense-in-depth strategy, **leaf**planner is employing ShardSecure as an additional security control. This approach ensured that **leaf**planner's client data would remain absolutely confidential.

Advanced data privacy

The ShardSecure platform works by protecting sensitive data within **leaf**planner's existing infrastructure, making it unreadable to unauthorized users. Even if third parties gain access to a **leaf**planner storage location, the data there will be unintelligible to them. The result is improved confidentiality for existing clients and the elimination of privacy concerns for new customer acquisition.

Based on independent assessment by leading data security academics, ShardSecure has been validated "to provide data security greater than or equal to levels of security offered by common encryption algorithms like AES or RSA."

Additionally, advanced data privacy is achieved without impacting the performance of **leaf**planner's SaaS application. Unlike traditional encryption solutions, which can slow performance by 5% to 40%, ShardSecure does not introduce any significant performance hits. ShardSecure's low latency and fast throughput approach can even improve performance in some cases.

Data security that goes above and beyond

leafplanner's clients were looking for a security solution that surpasses routine measures like encryption. The ShardSecure platform met these requirements by offering high availability, self-healing data, and robust data resilience.

The ShardSecure platform uses a series of data integrity checks to ensure that **leaf**planner's data remains accurate and unaltered. If a compromise is detected, the platform sends a security alert and restores the data to its last known-good state. The

ShardSecure platform also offers a configurable setting to automatically migrate data after a storage location fails a certain number of integrity checks, keeping data safe against cyber and insider attacks.

Additionally, the ShardSecure platform offers high availability at multiple levels. Each instance of ShardSecure is a virtual cluster that can be deplyed on-prem or in the cloud, and customers may opt to configure two or more virtual clusters for failover. The result is strong data resilience in the face of attacks and outages.

Support for SOC 2 compliance and the CIA Triad

SOC 2 is a security framework developed by the American Institute of Certified Public Accountants (AICPA) that outlines standards for data security, availability, processing integrity, confidentiality, and privacy. As a voluntary compliance standard, SOC 2 helps organizations set themselves apart from the competition by establishing effective and comprehensive customer data practices. ShardSecure's strong data security and resilience features significantly strengthen the security posture of **leaf**planner and other organizations looking to comply with SOC 2 requirements.

In addition, ShardSecure aligns well with the CIA triad of data confidentiality, integrity, and availability, which form three of the five cornerstones of SOC 2. With advanced protection against unauthorized access by infrastructure administrators, providers, and other third parties, ShardSecure also addresses the remaining two cornerstones of data privacy and security for customer data.

Easy, seamless integration

The ShardSecure platform allows for an easy plug-and-play implementation without any changes to exisiting workflows. Data can be accessed and moved easily, and only a few lines of code change are required for integration.

Because the ShardSecure platform appears and behaves like a standard storage location to other applications, **leaf**planner was able to integrate it into their existing security workflows without rewriting their SaaS solution, making integration of the ShardSecure platform a seamless fit for their business.

Discover ShardSecure's benefits today

Data privacy has become a significant concern for businesses of all sizes. Maintaining the privacy of client data is especially crucial for **leaf**planner, due to the highly sensitive nature of the information they collect from high-net-worth families.

With the help of ShardSecure, **leaf**planner has been able to attain advanced data privacy, security, and resilience and seamlessly integrate the ShardSecure platform into their existing SaaS application without performance drawbacks or agents.

For more information about our Data Control Platform and its benefits for your company, contact us today.

SHARD SECURE