



IFDS Case Study

IS Management, Policies, Standards and Audits



INTERNATIONAL FINANCIAL
DATA SERVICES

ERS Consultancy Ltd (ERS) has worked with businesses and government agencies of all sizes in a variety of highly demanding circumstances. This following case study illustrates the challenge and type of work that ERS is typically engaged to deliver.

Challenge / Requirement

The challenge was to ensure the company wide (UK region) existing security framework is assessed and revamped to be more applicable to IFDS in line with industry best practice, legal, regulatory requirements and standards such as Cyber Essentials, CPAS and ISO 27001.

Solution / How ERS Delivered

This involved review of current operational practices, generation of new security policies and procedures in line with ISO, Cyber essentials and industry best practices, development of security controls to address more advanced security threats. One of the challenges included a companywide refresh of information security documentation and establishing different tiers of governance documentation such as policies, standards, procedures and guidelines.

ERS also participated in various internal and external audits and supported in formulating remediation plans and continual development activities for IFDS.

Project Outcome / Results

This resulted in the establishment of tailored policies and standards within IFDS. Senior management (CIO, Security Team and Managers) involvement in embedding the policy sets and addressing audit findings by reviewing nonconformities and observations and supplying suitable corrective action plans.

Client Overview

IFDS is a joint venture between affiliates of Boston-based State Street Corporation, the world's leading provider of services to institutional investors, and DST Systems Inc., a Kansas City based leading provider of shareholder accounting services and proprietary systems.

IFDS is a global investor and policyholder outsourcing organisation, providing administration, technology and operational support for the financial services industry in APAC, Europe and North America.

Project: IS Management, Policies, Standards and Audits

Industry / Sector:
Financial Services
Private

ISO 27001

Penetration Testing

Cloud Security

Audits

Managed Services



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