

The Right Fit for a Billion-Dollar Vision: Oak Harvest's Partnership with Thrive



Vertical

- Financial Services

Services

- Advisory Services
- End User Support
- IT Automation
- Managed Infrastructure
- Microsoft 365
- Security

"What we were looking for was someone that could scale with our company from a cybersecurity and IT management standpoint—and for all intents and purposes, Thrive was it."

Chris Ayers

Vice President of Operations, Oak Harvest Financial Group

Oak Harvest Financial Group has spent over 15 years helping pre-retirees and retirees plan their futures with full-service retirement planning, portfolio management, and tax strategies. Since its early days with around 10 employees, the firm has grown to a team of 50 and now manages nearly \$1 billion in assets. As their size—and their regulatory oversight—grew, it became clear their IT strategy needed to evolve just as rapidly.

"We moved from regional to federal SEC oversight once we passed \$100 million in Assets Under Management (AUM)," said Chris Ayers, Vice President of Operations. "Our previous MSP was great locally, but they just didn't have the scale or industry specialization to support where we were headed."

Why Thrive? Proven Experience and Peace of Mind

Ayers, who had long served as Oak Harvest's unofficial IT lead, was managing growing demands from both regulators and internal stakeholders. What the firm needed was a partner with deep experience in financial services and the ability to proactively manage compliance, cybersecurity, and infrastructure at scale. Thrive brought exactly that.

"From day one, Thrive's vertical alignment with financial services gave me confidence," said Ayers. "They actually knew what our Chief Compliance Officer was asking for—they weren't just Googling things like our previous provider."

Getting It Done—Exactly as Promised

What impressed Oak Harvest the most was Thrive's follow-through. From initial onboarding to complex implementations, the team delivered what they promised, when they promised it.

"The biggest thing for me is that they've done basically everything they said they would do—in the time they said they'd do it," Ayers said. That included major initiatives like moving from Dropbox to SharePoint and OneDrive, eliminating \$10,000 in annual costs and improving document collaboration. Thrive also led the firm's migration from an aging on-prem Active Directory server to Microsoft Entra, vastly improving security, reliability, and remote access.

"I told them up front: this office is going to hate change," Ayers recalled. "But they held our hands through the process. It was a wild success."

Shifting from Reactive to Proactive IT

Before Thrive, IT was a reactive, piecemeal effort—sometimes leaving the team scrambling to meet new compliance demands. Today, the firm operates with strategic clarity and peace of mind.



"Our CCO sleeps better. I sleep better," said Ayers. "Just knowing we're 100 times better prepared for an SEC audit than we were a year ago is huge."

Even the day-to-day support experience improved dramatically. "I can't be the go-to for 50 people anymore. Now I point them to Thrive—and I hear nothing but positive feedback about the help desk and the portal."

More Than Worth the Investment

Yes, moving to a global MSP came with a higher monthly cost—but for Oak Harvest, the return on investment has been undeniable. Ayers shared, "Honestly, for what we're getting, it's a steal. Between cost savings, peace of mind, and scalability, the value is absolutely there."

About Thrive

Thrive delivers global technology outsourcing for cybersecurity, Cloud, networking, and other complex IT requirements. Thrive's NextGen platform enables customers to increase business efficiencies through standardization, scalability, and automation, delivering oversized technology returns on investment (ROI). They accomplish this with advisory services, vCISO, vCIO, consulting, project implementation, solution architects, and a best-in-class subscription-based technology platform. Thrive delivers exceptional high-touch service through its POD approach of subject matter experts and global 24x7x365 SOC, NOC, and centralized services teams. Learn more at www.thrivenextgen.com or follow us on [LinkedIn](#).