A CASE STUDY IN

Combined & Customized Services

THE SITUATION

In 2019, CrossCountry Mortgage's CIO left the company. At the time, she was also the acting CISO. In order to stay in compliance with industry regulations, the company needed to find a qualified security executive to fill in. In addition, the new CIO wanted to assess overall compliance, cybersecurity, IT preparedness and process gaps.

CrossCountry Mortgage was an existing client with Richey May and engaged on a number of services, including audit, tax and compliance.

> **The relationship had existed for about 4 years, from before I came to CrossCountry Mortgage. That said, JT and his team have some of the best industry knowledge in the business and I knew I could trust their communication.**
>
> – Jerry West, SVP of Infrastructure and Technology, CrossCountry Mortgage

WHY CHOOSE RICHEY MAY?

CrossCountry Mortgage was looking for a partner with:

- **A high level of mortgage industry-specific knowledge**, including the then-new regulations from the NY Department of Finance released in 2019.

- **High-quality IT services** from a well-staffed and credentialed team.

- **A qualified security executive** who could meet the compliance CISO requirements.

- **Reliable, regular communication** with a bi-weekly cadence and ad-hoc availability for critical issues.

- **Prior knowledge of their systems**, including loan origination system, firewall and remote work software, etc.

CROSSCOUNTRY MORTGAGE
Company Profile

$15.1 B loan volume (2019)
54,149 funded units (2019)

340+ branches nationwide
4,000+
employees nationwide

Looking for a trusted partner to work with on IT services, cybersecurity and to serve as vCISO.

> **The Richey May team has handled every technology problem we have thrown at them. They speak our language, so I know when I have a one-off, like a branch wanting to use a new system, they will evaluate it to our security standards quickly and I can trust it.**
>
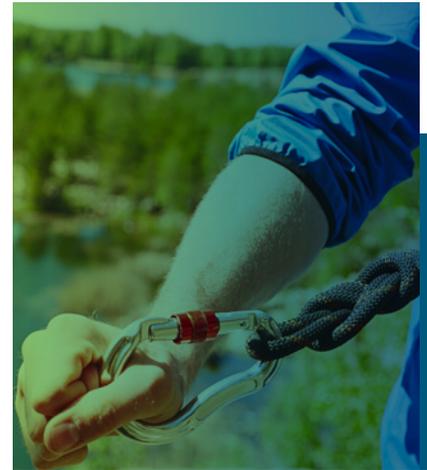> – Jerry West, SVP of Infrastructure and Technology, CrossCountry Mortgage

THE PROCESS

The Richey May Technology Solutions team works together to provide high-quality virtual CISO services. They update the CrossCountry Mortgage IT team on a bi-weekly vCISO call to discuss current and upcoming regulations and how they may affect IT compliance.

The team also regularly communicates with the CIO to assist with ad hoc IT security needs. For example, CrossCountry Mortgage was struggling with an issue involving their anti-virus software.

> **The program was forcing other critical operational programs to close. We needed to think quickly and creatively to get it shut down so the rest of the business could continue until we could fix the problem. Fortunately, we were able to work around the problem so the rest of operations wasn't forced to grind to a halt.**
>
> - Arnel Manalo, Cybersecurity Architect, Richey May Technology Solutions

THE FUTURE

> **Overall, we have a high level of confidence about the future. We just renewed our vCISO agreement and working with the team is a great experience. I can pretty much get ahold of someone on the team whenever I need them.**
>
> - Jerry West, SVP of Infrastructure and Technology, CrossCountry Mortgage

CrossCountry Mortgage plans to work with the Richey May Technology Solutions team on future engagements, including some system and security upgrades in 2020.