

AGILEBLUE | CENTCON

Fortifying Financial Security:

A Wealth Management Firm's Journey to Cyber Resilience and Compliance

Case Study



Company Profile

**COMPANY:**

Johnson Investment Counsel

FOUNDED:

1965

HEADQUARTERS:

Cincinnati, OH

INDUSTRY:

Financial Services

OTHER LOCATIONS:

- Cincinnati - Kenwood
- Cincinnati - West
- Cleveland - Akron
- Columbus
- Dayton
- Detroit

AGILEBLUE SOLUTION:

Cerulean AI Pro

WEBSITE:

johnsoninv.com

Overview

As one of the nation's largest independent Registered Investment Advisors (RIAs), Johnson Investment Counsel serves clients in all 50 states with a steadfast fiduciary commitment to their financial success. As cybersecurity threats continue to rise in the financial sector, maintaining compliance and protecting sensitive client data has become more critical than ever. However, Johnson Investment Counsel identified significant gaps in their existing security framework, including insufficient threat monitoring, inadequate vulnerability scanning, and lack of timely, critical alerting from their previous vendor - leaving them exposed to potential risks.

Recognizing the need for a more proactive and high-touch cybersecurity partner, Johnson Investment Counsel turned to CENTCON for guidance in evaluating top security providers. After a thorough assessment of multiple vendors, they selected AgileBlue for its AI-driven threat detection, robust reporting capabilities, and personalized customer support. AgileBlue's advanced security operations center (SOC) and AI-powered analytics could provide Johnson Investment Counsel with deeper visibility into threats, ensuring rapid detection and response to emerging cyber risks. This strategic partnership now strengthens their cyber resilience while helping them maintain compliance with evolving financial regulations, ultimately reinforcing their commitment to safeguarding client assets.



The Challenge: Gaps in Security Monitoring and Proactive Defense

Prior to working with AgileBlue, Johnson Investment Counsel faced critical security shortcomings with their previous provider.

Key Challenges

-  **Underperforming Security Monitoring:** Their previous provider failed to detect and alert on significant cybersecurity events, including a penetration test where an analyst gained extensive network access with minimal alerts.
-  **Ineffective Vulnerability Scanning:** Tools provided were unreliable, offering little confidence in security assessments and leading to exposure of unknown vulnerabilities.
-  **Lack of Proactive Support:** The previous vendor provided minimal communication, no regular security reviews, and no hands-on guidance, making it difficult for Johnson Investment Counsel to strengthen its security posture.
-  **Regulatory Scrutiny:** As both an RIA regulated by the SEC and a State-Chartered Trust Company, Johnson Investment Counsel undergoes cybersecurity audits every 18 months, requiring robust, reliable reporting and compliance-ready security measures.

The culmination of these challenges led Johnson Investment Counsel to seek a new cybersecurity provider that could deliver reliable monitoring, accurate reporting, and strong security expertise.

The Solution: AI-Driven Cybersecurity with AgileBlue

CENTCON played a key role in guiding Johnson Investment Counsel through their security provider evaluation, presenting multiple options and supporting their decision-making process. AgileBlue emerged as the ideal choice, offering the following:

01

AI-Powered Threat Detection & Response

AgileBlue's AI-driven security operations provided real-time monitoring and proactive threat detection, reducing false positives and eliminating blind spots in their security landscape.

02

Vulnerability Scanning & Remediation

Using AgileBlue's integrated vulnerability scanning, Johnson Investment Counsel saw a major improvement in security scoring, validating that previous vulnerability management tools were insufficient.

03

Cloud Security Expansion

AgileBlue extended protection beyond traditional infrastructure, incorporating Office 365, Salesforce, and Duo into the security monitoring umbrella—an area their previous provider neglected.

04

Enhanced Reporting & Executive Visibility

Automated, in-depth security reports allowed Johnson Investment Counsel to confidently present improved security metrics to their Board of Directors and regulators, strengthening compliance.

05

Dedicated Security Analysts & 24/7 Hands-On Support

Unlike their previous vendor, AgileBlue provided weekly meetings with a dedicated security analyst, ensuring regular touchpoints, continuous fine-tuning, and a true partnership rather than a transactional service.

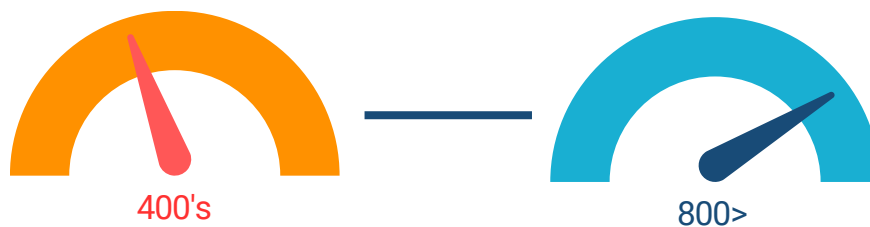
Implementation & Results

The onboarding process with AgileBlue was a critical phase in ensuring Johnson Investment Counsel's cybersecurity infrastructure was both effective and efficient. While the initial deployment required tuning to optimize alerting and reduce noise, AgileBlue's dedicated team worked closely with Johnson Investment Counsel every step of the way.

Vulnerability Score Transformation

Starting Score: 400s (indicating high vulnerability)

Current Score: 900+ (significant security improvement)



This massive improvement was a direct result of AgileBlue's accurate vulnerability scanning, allowing Johnson Investment Counsel to identify and remediate risks that were previously undetected.

More Measurable Outcomes

→ Stronger Cyber Hygiene

With proactive vulnerability management and patching, Johnson Investment Counsel significantly hardened its security defenses.

→ Regulatory Confidence

The firm demonstrated enhanced security measures to regulators, reinforcing its commitment to compliance.

→ Actionable Intelligence

AgileBlue's reports provided clear, data-backed insights for executive decision-making and cybersecurity strategy.

→ Stronger Partnership

AgileBlue's ongoing collaboration provided consistent security reviews, insights, and optimizations—a key differentiator from their previous vendor.

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"When we first started using AgileBlue's vulnerability scanning tool, our security score was in the 400s—far below where we needed to be. Today, we're in the 800s. That level of visibility and improvement was something we simply didn't have before."

RYAN EASTER

COO, JOHNSON INVESTMENT COUNSEL

Conclusion: Strengthening Trust, Compliance, & Resilience



Future-Proofing Financial Security

For Johnson Investment Counsel, the move to AgileBlue was not just about replacing an underperforming vendor—it was about achieving a proactive, AI-driven security posture that aligns with the firm’s fiduciary responsibility to its clients.

By working with AgileBlue and CENTCON, Johnson Investment Counsel eliminated security gaps, enhanced visibility, strengthened compliance, and transformed its vulnerability management strategy—all while benefiting from a true security partnership.

With continuous monitoring, expert guidance, and a commitment to cybersecurity excellence, Johnson Investment Counsel is now better equipped to face modern cyber threats with confidence.

AGILEBLUE

AgileBlue Cerulean AI combines AI-powered cybersecurity with the human touch you trust. Our SecOps platform autonomously detects, investigates, and responds to endpoints, network, and cloud cyber-attacks faster and more accurately than a legacy SOAR.

Our technology is both intelligent and automated, but we take a custom approach for every client we work with, analyzing and detecting exactly what matters most. Our products are entirely cloud-based with advanced machine learning and user behavior analytics, all supported by our U.S.-based team of cyber experts.

For more information, visit our website: AgileBlue.com.

Ready to start protecting your company?

Request a Demo



CENTCON

CENTCON is a trusted cybersecurity and IT solutions provider, specializing in managed security, cloud solutions, and infrastructure optimization. With a mission to empower organizations with cutting-edge technology and expert guidance, CENTCON helps businesses navigate complex security challenges and implement tailored solutions that enhance resilience, compliance, and operational efficiency.

As a strategic partner, CENTCON works closely with companies to identify the right security solutions, ensuring seamless integration and proactive defense against evolving cyber threats. Their partnership-driven approach has helped firms like Johnson Investment Counsel achieve stronger cybersecurity postures and regulatory confidence.

Visit CENTCON at centcon.io to learn more about how they can help protect your business.

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