

**ForwardLine Financial** - forwardline.com - phone: 310.454.5867,  
21700 Oxnard Street, Woodland Hills, CA

**Stewart Sui** - Chief Risk and Analytics Officer - stewart.sui@forwardline.com, phone: (866) 623-4900 x 259, 2<sup>nd</sup> phone: 866.623.4900

Other emails: stewart.sui@forwardline.com, stewart.s@forwardline.com

LinkedIn: <https://www.linkedin.com/in/stewart-sui-756354a>

**Contact 2 Info: Sri Kaza** - Chief Executive Officer – sri.kaza@forwardline.com, (866) 623-4900 ext. 282, 866.623.4900

**Contact 2 LinkedIn:** <https://www.linkedin.com/in/srikaza>

Other emails: sri.kaza@forwardline.com, sri.k@forwardline.com

**Total annual spend for IT and cybersecurity development measures for your company:** 100000

**Industry Sector:** Banking / Finance

**What are key products or services offered by your company?** Loans, line of credit, merchant cash advance for small and medium sized businesses

**How many people are employed by your company?** 50- 100 employees

**What is the current annual revenue for your organization?** \$100M-\$250M

**How many business locations do you maintain company hardware and equipment such as servers...?** 2

**How many people are in your IT Department?** 5

**How many people are on your IT security team?** 1

**Number of Contact Center Seats:** 50

**What is your current Operating System?** Windows, OSX

**Who is your current ERP vendor?** Dell

**Who is your Cloud Service Provider?** AWS

---

**1) Do you have responsibility for Cybersecurity?** yes

**Do you plan to add or expand cybersecurity initiatives in the next 12 months?** yes

**Please specify which solutions you are interested in speaking to solution providers about with current and future projects in mind:** , Application Security and WAF, API Security, Cloud Security, Data Loss Protection, Data Center Security, Data Security, DevOps Security, Disaster / Backup Recovery, Email Security, Endpoint detection response (EDR) Endpoint prevention, Fraud Prevention / Transaction Security, Network Security - Intrusion Prevention Systems Network Security - Unified Threat Management Penetration Testing and Simulation, Phishing, Ransomware Threat Intelligence Web Security

**Please summarize your top Cybersecurity challenges you need assistance with in the next 3-6 months. Please be as descriptive as possible and provide context around your current needs. (this ensures a relevant schedule):** phishing is still an issue for us. got defender2 but still having problems.

---

**2) Do you have responsibility for Cloud software solutions?** yes

---

---

**Do you plan to add or expand cloud solution initiatives in the next 12 months?** yes

**Please specify which solutions you are interested in speaking to solution providers about with current and future projects in mind:** Backup/Disaster Recovery, Business Intelligence, Dev-Ops, Storage

**Please summarize your top Cloud Solutions challenges you need assistance with in the next 3-6 months. Please be as descriptive as possible and provide context around your current needs. (this ensures a relevant schedule):** more in

aws\_x000d\_  
streamline\_x000d\_  
data protection

---

**3) Do you have responsibility for Digital Solutions?:** yes

**Do you plan to add or expand digital responsibility initiatives in the next 12 months?:** yes

**Please specify which solutions you are interested in speaking to solution providers about with current and future projects in mind:** Artificial Intelligence Machine Learning Digital Security Robotic Process Automation (RPA),

**Please summarize your top Digital Solutions challenges you need assistance with in the next 3-6 months. Please be as descriptive as possible and provide context around your current needs. (this ensures a relevant schedule):**

automate steps in the loan approval process\_x000d\_  
\_x000d\_  
reject letter automation

---

**4) Do you have responsibility for Data Management?** yes

**Do you plan to add or expand data management initiatives in the next 12 months?** yes

**Please specify which solutions you are interested in speaking to solution providers about with current and future projects in mind:** Backup/Disaster Recovery Big Data Analytics, Business Intelligence Data Warehousing, Server Storage

**Please summarize your top Data Management challenges you need assistance with in the next 3-6 months. Please be as descriptive as possible and provide context around your current needs. (this ensures a relevant schedule):** cost cutting for snowflake

---

**5) Do you have responsibility for Software/Application Development and Management?** yes

**Do you plan to add or expand software / application development initiatives in the next 12 months?** yes

**Please specify which solutions you are interested in speaking to solution providers about with current and future projects in mind:** , Application Architecture, Application Integration Automation Testing Software, Cloud, DevOps, Open Source Outsourced Software / Application Development Web

**Please summarize your top Software/ Application Development challenges you need assistance with in the next 3-6 months. Please be as descriptive as possible and provide context around your current needs. (this ensures a relevant schedule):** automated testing would be good\_x000d\_

---

**6) Do you have responsibility for Communication Systems?** yes

**Do you plan to add or expand communication system initiatives in the next 12 months?** no

**Please specify which solutions you are interested in speaking to solution providers about with current and future projects in mind:** ,

**Please summarize your top Communication Systems challenges you need assistance with in the next 3-6 months. Please be as descriptive as possible and provide context around your current needs. (this ensures a relevant schedule):** no

---

---

7) Do you have responsibility for Network Systems? yes

Do you plan to add or expand network system initiatives in the next 12 months? no

Please specify which solutions you are interested in speaking to solution providers about with current and future projects in mind: ,

Please summarize your top Network Systems challenges you need assistance with in the next 3-6 months. Please be as descriptive as possible and provide context around your current needs. (this ensures a relevant schedule): no

---

8) Do you have responsibility for Consulting / Outsourcing? yes

Do you plan to add or expand consulting / outsourcing initiatives in the next 12 months? no

Please specify which solutions you are interested in speaking to solution providers about with current and future projects in mind: ,

Please summarize your top Consulting/Outsourcing challenges you need assistance with in the next 3-6 months. Please be as descriptive as possible and provide context around your current needs. (this ensures a relevant schedule): no

---

9) Do you have responsibility for IT Leadership, Talent Management and Training? yes

Do you plan to add or expand IT leadership, talent management, and training initiatives in the next 12 months? yes

Please specify which solutions you are interested in speaking to solution providers about with current and future projects in mind: , Staffing - Outsourced staffing - Project based, Staffing - Permanent to hire IT staffing, Staffing - Permanent to hire Cybersecurity staffing, Staffing - Staff Retention

Please summarize your top IT Leadership, Talent Management and Training challenges you need assistance with in the next 3-6 months. Please be as descriptive as possible and provide context around your current needs. (this ensures a relevant schedule): best way to hire at low cost. considering rpo.

---

