



PREPARATION FOR SOC2 AUDIT

EXECUTIVE SUMMARY

SavvyMoney Inc., a provider of secure financial technology solutions, is committed to maintaining a high standard of operational excellence and data protection. As part of this commitment, the company undergoes SOC 2 audits every six months to validate its internal controls and compliance posture. Recognizing the operational complexity and resource demands associated with recurring audits, SavvyMoney engaged Innovative Digital Transformation LLC (IDT) to support and streamline its audit preparation efforts.

Undergoing SOC 2 audits every six months is an essential part of our security and compliance strategy, but it comes with significant operational demands—particularly around documentation, evidence collection, and control validation.

We engaged IDT LLC to help us streamline this process, and their structured approach made a measurable difference. They guided us through every step, ensured nothing was overlooked, and significantly reduced the pressure on our internal teams.

Thanks to IDT's expertise, we were able to approach our audit with clarity and confidence. They've proven to be a reliable, knowledgeable, and efficient partner—and we highly recommend them for any organization navigating complex compliance requirements.

Michael York
VP, Information Security and DevOps
SavvyMoney Inc.

THE CHALLENGE

To offer their products to the market, SavvyMoney must maintain ongoing SOC 2 compliance. The biannual audit process requires extensive documentation, evidence collection, and validation against continuously evolving compliance controls. While SavvyMoney has robust internal practices, the company lacked the capacity to independently manage the full scope of preparation activities without diverting critical resources from core business operations. As such, they sought a partner who could bring structure, clarity, and efficiency to their compliance efforts.

IDT SOLUTION

IDT LLC was engaged to support SavvyMoney through a structured SOC 2 audit preparation process. The engagement focused on reducing the operational burden of audit readiness by implementing a systematic approach to compliance alignment, evidence collection, and documentation.

To assist with meeting audit requirements, IDT utilized a suite of AWS-native tools tailored to the customer's cloud environment:

- AWS SecurityHub for continuous security posture monitoring and alignment with industry benchmarks.
- IAM Access Analyzer to validate least-privilege access and policy configurations.
- AWS Inspector for automated vulnerability scanning across workloads.

Working closely with SavvyMoney's internal teams, IDT helped identify and organize required evidence, align technical controls with SOC 2 standards, and prepare audit-ready documentation. This proactive approach helped ensure full coverage of the required controls without disrupting day-to-day operations.

THE BENEFITS

With IDT's support, SavvyMoney successfully streamlined its SOC 2 audit preparation process. The engagement:

- Reduced internal workload and freed up team resources.
- Ensured timely and accurate evidence collection for auditors.
- Improved audit readiness through enhanced visibility and structured reporting.
- Increased confidence in passing biannual SOC 2 audits with minimal operational disruption.

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