

## Maier & Associates Financial Group, Inc.

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### Overview

Maier & Associates is a highly respected financial group servicing the Great Lakes Bay Region in Michigan. Maier & Associates takes the time to get to know their clients' personalities and needs- communication is their most important tool! For over 32 years they have built not only strong portfolios but create strong client/advisor relationships.

### Challenge

Technology can be difficult to manage, and when security necessities of the financial industry are added in, technology often times becomes a headache. Clients of Maier & Associates trust them with their personal and sensitive information, it is Maier & Associates responsibility to ensure every client top of the line protection. Maier & Associates became overwhelmed with the constant security threats and decided it was time to partner with a technology expert.

Maier & Associates frustrations were typical of many others in the financial industry. Previously, they used a disk to disk backup system but had to make sure they remembered to use a new backup disk every day. They had to remove their backup disks offsite each day in order to protect themselves from a disaster at their building but this left them very vulnerable to security threats and issues if the disks were not in a secure, climate controlled location. Another frustration Maier & Associates faced was their APC (American Power Conversion) batteries going bad, they were having to replace one of the four every year and even had one which was a fire hazard when it overheated.

The financial industry is fast paced and their clients want feedback and contact regularly, this posed an issue for Maier & Associates because they had very limited access to their server, access from outside the office was very slow and jumpy. "I was never confident taking a vacation because I didn't have access to our firms information if need be, I also had a constant worry about our server crashing or having to replace it," Joe Maier of

### Solution

In March of 2015 Maier & Associates partnered with SPI, they made the decision to eliminate their challenges and start the transition into cloud computing. Maier & Associates considered smaller technology firms but were not confident they could meet their immediate needs. "SPI offers a remote technician that is always there and has the ability to handle our day to day needs. When something requires an actual on-site visit, they have a large field technician group that allows them to be timely in response. Their sales team is very knowledgeable, easy to talk to and understand; which is very important when you don't know IT lingo," said Maier

## BENEFITS

- ⇒ Access data anytime, anywhere
- ⇒ Immediate & long-term savings
- ⇒ Your data is secure, safe
- ⇒ 24/7 Helpdesk
- ⇒ Email Services
- ⇒ Predictability

*"I now have peace of mind knowing my IT is in the hands of a much more capable company."*

### Joe Maier

Investment Advisor  
Maier & Associates  
Bay City, MI  
<http://maierandassociates.com/>

Every transition will have its hurdles but communication regarding those hurdles was extremely important to Maier & Associates, "SPI did a great job with daily contact on progress and did their best to translate any issues we were facing, in a manner that made sense," said Maier. Joe Maier has many responsibilities at Maier & Associates, aside from dealing with technology issues, SPI took the IT burden off Joe so he could focus on what makes his business great. "I now have peace of mind knowing my IT is in the hands of a much more capable company," said Maier.

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## Results

Today, Maier & Associates is successfully migrated onto SPI's cloud, along with managed services. Maier said, "Financially it was a no brainer, the amount of money we were spending to purchase and maintain our own equipment was foolish, the monthly fee to add cloud services through SPI made much more sense, not to mention secure," said Maier.

In the financial industry, relationships are based on trust and as clients get older and retire, they tend to move about the country. "Because of SPI, we have the ability to provide our services abroad, our clients are more confident and at ease knowing we can support them wherever they go," said Maier.

"If your business operates like mine, the longer you leave IT on the back burner, the easier you will get burned when you go to use it. Using SPI's managed service program coupled with their cloud management services allows me and my team to focus on building our practice and spending time with our clients," said Maier.

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SPI offers clients the power of cloud computing without the headache of becoming an expert or managing yet another job. SPI provides clients their entire IT knowledge and an environment that helps them bridge the gap between previous technology and technology of the future.

When you're ready to experience the SPI difference give them a call and they will send one of their technology experts to you. Reliable technology solutions focused on security, productivity and profitability.



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