



## “Creating Successful Retirement Plan Experiences For Employers and Employees”

### Case Study/ 401(k) Advisors, Inc.

#### CUSTOMER PROFILE

401(k) Advisors is an investment company that helps plan out small to large businesses' retirement futures. This includes offering protection against liability from personal and corporate fiduciaries, along with providing their clients with investment opportunities.

#### BUSINESS SITUATION

401(k) Advisors needed a reliable and responsive technology partner to help with their growing enterprise without having to hire a dedicated IT staff.

#### SOLUTION

xRM has helped 401(k) Advisors grow their back-end processes while freeing them to focus on business growth. The company started off with personal computers and has now moved towards Microsoft Exchange Servers at a rate that allows them to expand further and succeed.

#### BENEFITS

- Provides the visibility needed to improve performance
- Grows at rate of business
- Extends existing infrastructure and processes
- Aligns the organization to a common mission and strategy

401(k) Advisors, Inc. is always looking for more efficient and effective ways to run their business. Technology is something that is critical to any business, and it's constantly changing. 401(k) was looking for a reliable and professional outsourced information technology (IT) solution. A technology partner, if you will, that would allow them to focus on growing their business and not worry about IT. When xRM was first called in to assist, 401(k) was made up of three people.

Five years later, there are 20 employees and they are growing fast. xRM implemented a scaleable solution that allowed 401(k) to start small, and easily scale as new employees were hired. From a peer to peer network at startup, to a Windows 2003 Server Active Directory environment, xRM has provided solutions that work well and have been cost-effective.

Some of the specific technologies implemented and managed for 401(k) are as follows: Microsoft Windows 2003 Server, Microsoft Exchange, Microsoft SQL Desktop Engine (MSDE), Software Update Server, Symantec Anti-Virus Corporate Edition, ACT! Premium for Workgroups, Veritas Backup Executive, and Microsoft's complete line of Office Professional.

Part of 401(k)'s current success revolves around the freedom they have to focus on their specialty and not worry about anything else. xRM management of their IT infrastructure gives them the continuing ability to do just that.



“Streamline Solutions has never let us down when it comes to providing exceptional work that is always affordable, accurate and efficient. They are always looking to go the extra mile, which makes our business a part of theirs.”

Jami Chapman  
Chief Operating Officer  
401(k) Advisors

“401(k) Advisors is a service organization that relies on state-of-the-art technology to create flawless execution of our services for all of our customers. Streamline Solutions allows us to meet this objective through our strategic business partnership. Streamline Solutions has created super cost-effective IT/IS solutions for our employees and our customers that rival companies 10 times our size. As the CEO, I am concerned about IT/IS solutions that save us time and human capital, while providing solutions that are unique and allow us to deliver greater value to our customers. Streamline Solutions has exceeded all of my IT/IS expectations in every way.”

Vince Giovinazzo  
Chief Executive Officer  
401(k) Advisors