



“Honesty and Integrity”

Case Study/ Eclectic Associates.

CUSTOMER PROFILE

Eclectic Associates' goal is to provide the finest fee-only financial advice to all clients, and to enable them to meet their goals.

BUSINESS SITUATION

Eclectic was seeking a more consistent and proactive approach to their IT, a comprehensive solution that would address their software, hardware and ongoing service needs.

SOLUTION

xRM tailored a recurring service contract to meet Eclectic's needs, one that worked well for both parties and provided Eclectic with the reliability they were looking for.

BENEFITS

- Recurring fixed cost
- Latest technology
- Service level guarantees
- Proactive approach

Eclectic Associates believes that diversification is the key to both growth and capital preservation in today's everchanging business environment. It's needed among all asset classes, including cash, bonds, stocks and real estate. Information technology plays a key role in allowing Eclectic to strategically guide their clients. That's why the company was looking for a vendor that would deliver and support their IT infrastructure, thus allowing them to focus on their customers.

xRM recommended the purchase of two new servers, and updating all servers and workstations to a Microsoft 2003 environment. Microsoft applications are now as follows: Windows 2003 Server, Exchange 2003 Server, Software Update Services, Terminal Services, Windows XP Pro and Office Pro 2003. Additionally, Act 2005 Premium for their database, Symantec Corporate Edition for Anti-Virus, and Veritas Backup Executive for backups were all implemented.

Eclectic has a unique approach and allows their clients to always maintain control over their investments. They provide professional resources, guidance, and advice for a very fair value. This "value" approach is one that xRM firmly believes in and practices, something which ensures the continuing success of the partnership between the two companies.

"Streamsol provides us with a way of outsourcing our computer technology needs so we can focus on our business of financial planning and investment advice. Their responsiveness to our needs is one of their key benefits. If we have a problem, they get on it right away either through remotely accessing our system or by coming on-site. We have found them to be knowledgeable about computer technology and willing to learn about our business to better accommodate our needs. The people who work at Streamline have both good computer skills as well as the ability to relate well to us. We enjoy working with them."

Carl Camp
President
Eclectic Associates

