

# CASE STUDY

When a California wealth management firm needed the right technology, it made 'cents' to trust TPx

## Fully Vested: A Financial Services Company's Investment in Microsoft 365 and Reliable Support



TPx is quick to respond when we need something. Getting a fast response to questions means we can continue to move our business forward."

*Eric Maxwell,  
Founder, CEO Wealth Management Director,  
Financial Advisor*



Maxwell Wealth Strategies is a registered investment adviser located in Pleasanton, California. The company offers a team approach to financial planning, offering its customers a broader scope of expertise than they will likely find in any one person. Clients' successes are the company's main priority, and the team works to understand the unique circumstances and ultimately create a customized plan that provides a successful roadmap for a client's financial journey.

### PROFILE

Maxwell Wealth Strategies, a Raymond James Financial Services-aligned firm, is a registered investment adviser located in Pleasanton, California.

### CHALLENGE

- The financial investment company could spend five or more hours per week dealing with its IT provider, which took time away from its core business

### SOLUTION

- Maxwell deployed Managed Microsoft 365 for its team of six people

### BENEFITS

- The weekly time spent on IT was reduced to mere minutes
- Maxwell was able to leverage TPx's expertise to turn on some pro version features of 365 to improve productivity

### RESULTS

The partnership has saved the Maxwell team considerable time, allowing it to focus its resources on its clients

## The Challenge

Founder Eric Maxwell has more than 30 years of helping his clients navigate the life-changing financial decisions they must make. Managing his client relationships takes time, which doesn't leave him with enough to focus on his IT needs. He's busy managing his clients' money, and every minute he spends on IT is one less minute he can focus on his clients.

So, when the local IT provider they previously worked with was slow to respond to questions and IT requests, Maxwell knew they needed to find a new provider they could depend on. Long waits were unacceptable in a business built on personal attention and timeliness, but responsiveness was only one aspect of what they were looking for in a provider.

Maxwell's team of six also had some big needs when it came to getting the right solution to keep their client data secure. Because the team's work primarily deals with personal information, they needed an easy-to-use system that prioritized security. "We have to do it properly, make sure it's protected and encrypted," Maxwell said. "We think about it all the time but don't want to worry about it."

Maxwell recognizes the complex threat landscape facing businesses today and knows the financial industry is particularly vulnerable due to the valuable information bad actors can exploit. The Maxwell team needed expert counsel they could rely on, and TPx was ready and able to support their needs.

"It's really important in our industry that we don't mess up, and that we make sure everything's archived correctly and password protected," Maxwell recalled. "There were some questions that we asked and some concerns that we had, and we felt our previous IT provider didn't know exactly what the answer should be. We thought it would be better to look for a provider that could offer something more secure."

## The Solution

That's where TPx entered the equation. Maxwell was looking to find a new partner that would be both easy to work with and more responsive to any questions. He chose TPx's Managed Microsoft 365 solution because it provided best-in-class technology with support from a knowledgeable and responsive team. With TPx, Maxwell gets his questions and needs met quickly — even those as simple as setting up and onboarding a new colleague.

Previously, Maxwell might easily spend five or more hours per week dealing with the IT provider; with TPx, the time has been reduced to mere minutes.

"It's a really big deal," Maxwell said. "TPx is quick to respond when we need something. Getting a fast response to questions means we can continue to move our business forward. When we had to wait on the answer from our previous provider, everything was put on hold because we couldn't communicate with our clients. Now, it doesn't take very long to get our operations back up and running — usually by the next day, if not sooner."

But it wasn't just the slow response times that were a sticking point. The TPx team proactively helped Maxwell get greater value out of their software investment.

"We had upgraded to the pro version of Microsoft 365 a while back, but there were some features it offers that you have to turn on. We don't always know how to do that," Maxwell said. "So, when we would try to get that information with our previous provider, it was really difficult. Now, it's just one phone call — either somebody does it for us, or they tell us how to do it immediately."

## The Results

More than anything, Maxwell found a trusted IT partner that is fully vested in his business goals and who has made his success their success.

"As a small company, there have been a lot of times that we've gotten the support we need to look and act like a big company to get things done quicker," Maxwell said. "Obviously, the time savings and making sure projects get done and new employees get on board have been good. It was a smooth process to make the transition."

Maxwell can call his dedicated TPx representative directly as needed and tap into TPx's subject matter experts to discuss critical technology topics — such as the ever-present concern about cybersecurity.

## About TPx

TPx is a nationwide managed services provider (MSP) delivering cybersecurity, networks, business internet and cloud communications at scale. For more than two decades, TPx has helped customers across every business sector address the growing complexity of their IT environments. With a full suite of managed IT services, TPx is making IT more accessible for businesses coast to coast. For more, visit [tpx.com](http://tpx.com) or follow us on [LinkedIn](#), [Twitter](#), and [Facebook](#).

