

Lifespan
WEALTH MANAGEMENT®, INC.
Formerly Rosenberg Financial Group

- BUSINESS TECHNOLOGY CASE STUDY -

THE CLIENT

INDUSTRY: Financial Services
REVENUE: <$3 million
TEAM SIZE: 6 Employees
LOCATIONS: Multi Location in Georgia

THE SITUATION

- Business ownership spending over 50% of the time dealing with I.T. issues
- Managing multiple technology vendor relationships and unhappy with the overall costs while still having to self-remediate issues
- Ownership unable to enjoy time away from the office without having to deal with I.T. issues
- The business requires high-levels of information security and handles personal financial data

THE CLIENTS WORDS

Working with ITVantix has allowed me to better focus my time and resources on what makes our business profitable.

Our I.T. and Phone systems have never been as reliable as they are now and their friendly engineers are always available whenever we need help.

I highly recommend them!

Randy Goss
Vice President



HOW DID WE HELP?

Key leadership at Lifespan Wealth Management resorted to managing all aspects of the computer and phone systems within their business and found themselves overwhelmed by the time-consuming tasks of troubleshooting, performing upgrades, replacing systems, patching, and managing backups, accounting for over 50% of their time.

Recognizing the need for a strategic shift, the decision was made to outsource I.T. responsibilities to ITVantix, a move that alleviated the burden and enhanced operational efficiency.

We immediately helped them transition to our MAXX Care Fully Managed I.T. Services and quickly migrated them to our MAXX Voice phone system.

- We ultimately took over their alarm & video surveillance with MAXX Security
- We provided a Toshiba Copier with our MAXX Office equipment services
- We eliminated several different technology vendors and provided a One Source approach to procuring technology products & services

And, we can do all of this for a fraction of what it would cost to hire one qualified I.T. person!

CALL US ON (478) 257-4373 TO FIND OUT HOW WE CAN HELP YOU!



*Our team would LOVE to help you with your IT. Give us a call on **(478) 257-4373** and let's have a quick 10-minute non-salesy chat!*

MAXX
I.T. Superhero
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MAXX

ITVantix
We Manage Technology