

CLIENT PROFILE



SUMMARY

The Matheis Associates Benefits Consultants are client oriented financial planners and benefits consultants. As financial planners, all their data is sensitive and mission critical. Working with other people's money, the Matheis Associates need to know that their computer network complies with their industry security standards. Idealogical Systems Inc. secured the Matheis Associates data and integrated their diverse financial planning software tools.

KEY SOLUTIONS

- Industry Standardization
- Centralized Virus Protection Measure
- Disaster Recovery System
- Fail-Safe Server System
- Hardware and software standardization



A NEED TO MEET INDUSTRY STANDARDS

Each company has their strengths. For the Matheis Associates, it is managing investment portfolios; and for Idealogical, it is making technology work.

The Matheis Associates recognized that they needed to develop a close working relationship with their technology consultants, in order to comply with software and hardware specifications dictated by the Ontario Securities Commission. The Matheis Associates chose Idealogical Systems to analyze their business processes and develop a solution to meet these strict industry standards. This integration process is a complete solution that considers security, disaster recovery and consistency.

KEEP IT THE SAME

In any system, standardization ensures reliability. Standardization is the first area that Idealogical Systems addressed during the Matheis Associates integration process. Without **standardization**, hardware and software compatibility issues may result in inefficient and ineffective use of data. Idealogical Systems applied best practice information technology standards to the Matheis Associates work environment. By reducing downtime, the Matheis Associates experienced an immediate improvement in office productivity.

KEEP IT SAFE

To keep this data safe, Idealogical Systems implemented a **Centralized Virus Protection Measure**. According to the leaders in network security, virus and malicious code are leading causes of data loss and downtime. By having virus protection centralized, virus incidents can be monitored and managed remotely. This reduces the time that the Matheis Associates may have to be concerned with potential threats and allows them to concentrate on their core business, making money for their clients. Idealogical Systems can remotely monitor and assess any virus threats and take appropriate actions.

The other leading cause of downtime in corporations is an inadequate backup system. For any data intensive service company, like financial planners, data loss would be detrimental to their business. A reliable backup and **Disaster Recovery System** ensures that data can be retrieved quickly and easily in the event of accidental deletion, unauthorized data deletion or disaster. For the Matheis Associates, their Disaster Recovery System enables the recovery of data from one day to one month ago.

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MISSION CRITICAL

Financial Planning is a very competitive and demanding industry. When every minute counts, it's important to know that your technology is reliable. To improve on the existing infrastructure, Idealogical Systems uses industry recognized components and manufacturer backed warranties. Not only do we stand by our work, but we also want the manufacturer to stand by their product. By using only reputable manufacturers, we ensure our clients get the best product for their budget.



"The Idealogical Team "gets it" and they get it done, on time, on budget and leave you with a sense of confidence that your goals and objectives have been met."

Patti Matheis, Vice-President, Human Resource Services
MATHEIS ASSOCIATES BENEFITS CONSULTANTS INC.

As an extra measure of protection and in order to address business interruptions due to emergencies such as power outages and surges, Idealogical Systems implemented a **Fail-Safe Server System** for the Matheis Associates. This system, which includes a redundant power supply, surge protection and an uninterruptible power supply prevents hardware or data damage due to power issues.

In the financial world time is money! Maintaining an organizational structure that can bear the demands of this fast paced industry is paramount. Idealogical Systems provides the Matheis Associates with the technological environment to enable them to concentrate on designing strategic solutions for their clients, rather than concerning themselves with the technology that powers their business.

FOR YOUR SOLUTION

For information about how Idealogical Systems can help your business, please contact us today.

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