

**Title:** Using Swizznet's QuickBooks Hosting to Provide Remote CFO and FINOP Services  
**Customer:** Maven Strategic  
**Products:** QuickBooks Hosting for Accountants  
**Date:** June 2013

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## Highlights

- **Problem:** Strict industry regulations forced the financial services consultant to find a solution where up-to-date accounting information was available to them, their clients and regulators instantaneously.
- **Solution:** Maven Strategic chose Swizznet for its unparalleled up time and strict concentration on customer service.
- **Results:** Since partnering with Swizznet, the consulting firm has had more time to devote to growing its business, which it has by 300 percent.

## Overview

Founded in 2004, Maven Strategic Solutions, LLC ("Maven Strategic"), provides professional financial consulting services, with a focus on small to medium-sized businesses.

The company's core service offerings include outsourced controller/CFO services for small to medium sized businesses, as well as FINOP, compliance and reporting services for securities broker/dealers and related entities. Its customized services are designed to provide financial expertise at affordable rates. And as a trusted advisor, they enable their clients to do what they do best, whether its sales, customer service or product development while knowing its financial services are being stewarded by industry professionals.

## Challenges

Steven Singer, Founder, Maven Strategic, has spent the past 20 years in the financial services industry and knew he had something special when he founded Maven Strategic. Singer says, "When I founded this company I knew there was a great need for small and medium sized businesses to have the financial expertise that a large enterprise could access."

After starting with a couple of clients in private practice, Singer said the first decision he made was to find a tool that could help the business always remain in compliance with industry regulators and could also help grow the business. "Any time you are working in the financial services arena, regulators are always a phone call or a knock at the door away. They expect financial records to be up-to-date and always accessible. In the past, when files were emailed back and forth between a company and its clients, this was rarely possible. Either we or they were always making updates and it was rarely clear who had the most current file. I didn't want to start my company with that headache already built-in."

Singer says after investigating several different tools he knew an online option wouldn't be enough. It had to be a cloud-hosted solution where he and his clients always had real time access to their financial reports. That's why he trusted Swizznet to be Maven Strategic's first business partner.

## **Results**

Since partnering with Swizznet, Maven Strategic has grown its business approximately 30% year over year, or 300% total. The reason for this is, is because Swizznet offers the same value proposition to Maven Strategic that it offers its clients.

Singer says, "With Swizznet, I didn't have to become an IT expert and run my financial consulting firm at the same time. I'm able to focus on my clients and ensure they are receiving the highest level of service I can provide, while knowing we are always in compliance with real-time anywhere access to their financial documents thanks to Swizznet."

"In talking with others about hosting providers, I knew two key deal-breakers for me would be unscheduled down-time and poor customer service. As a consultant, I am in the customer service business and expect a lot from those I partner with. And with Swizznet I have never been disappointed. Everyone I've worked with at Swizznet wants Maven Strategic to grow and succeed just as much as we do. They won't stand for unscheduled down-time because that means their clients aren't able to operate at their peak. That is unacceptable to them and very refreshing for me as a client."

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