



Xamin is a SOC 2 certified technology consulting and managed services firm focused on providing superior client service and leading edge IT solutions.

p (844) 449-2646  
f (847) 883-8704  
xamin.com mslc.com  
@xamininc @msllccpas

475 Half Day Road, Suite 500  
Lincolnshire, IL 60069  
311 S. Wacker Drive, Suite 2650  
Chicago, IL 60606

## Clients + Friends

---

At Xamin, we focus on fostering long-term partnerships based on mutual trust and collaboration. We invest in leading-edge technologies that predict, rather than react to, future business needs. Our solutions include infrastructure, security, cloud, data protection and consulting services.

In our experience, there is no substitute for integrity. We've gained the trust of organizations across the country by going above and beyond — by taking the time to understand each unique challenge and implementing customized solutions that not only meet expectations, but exceed them. A consultative, “white glove” approach is the fabric of our existence. We apply *The Xamin Proven Process* and align strategic goals of the business with ideal technology, services, and best practices. We are confident in immediate value creation and back it up through our brand promise.

Xamin is a SOC 2 certified company working with several HIPAA compliant firms. We have maintained zero deviations on our annual report year after year. Less than 1% of MSPs in the country hold this distinction.

Technology is ever-changing and organizations must remain flexible and adaptable. Cloud technologies are as equal an opportunity as they are a threat. Our vendor management strategies and safeguards ensure technology partners remain in compliance. We differentiate ourselves by investing deeply in our advisory approach over the traditional “set-it-and-forget-it” model and always provide optionality to our relationships.

We look forward to building a partnership to help you achieve your goals.



Jonathan Smith  
Chief Executive Officer

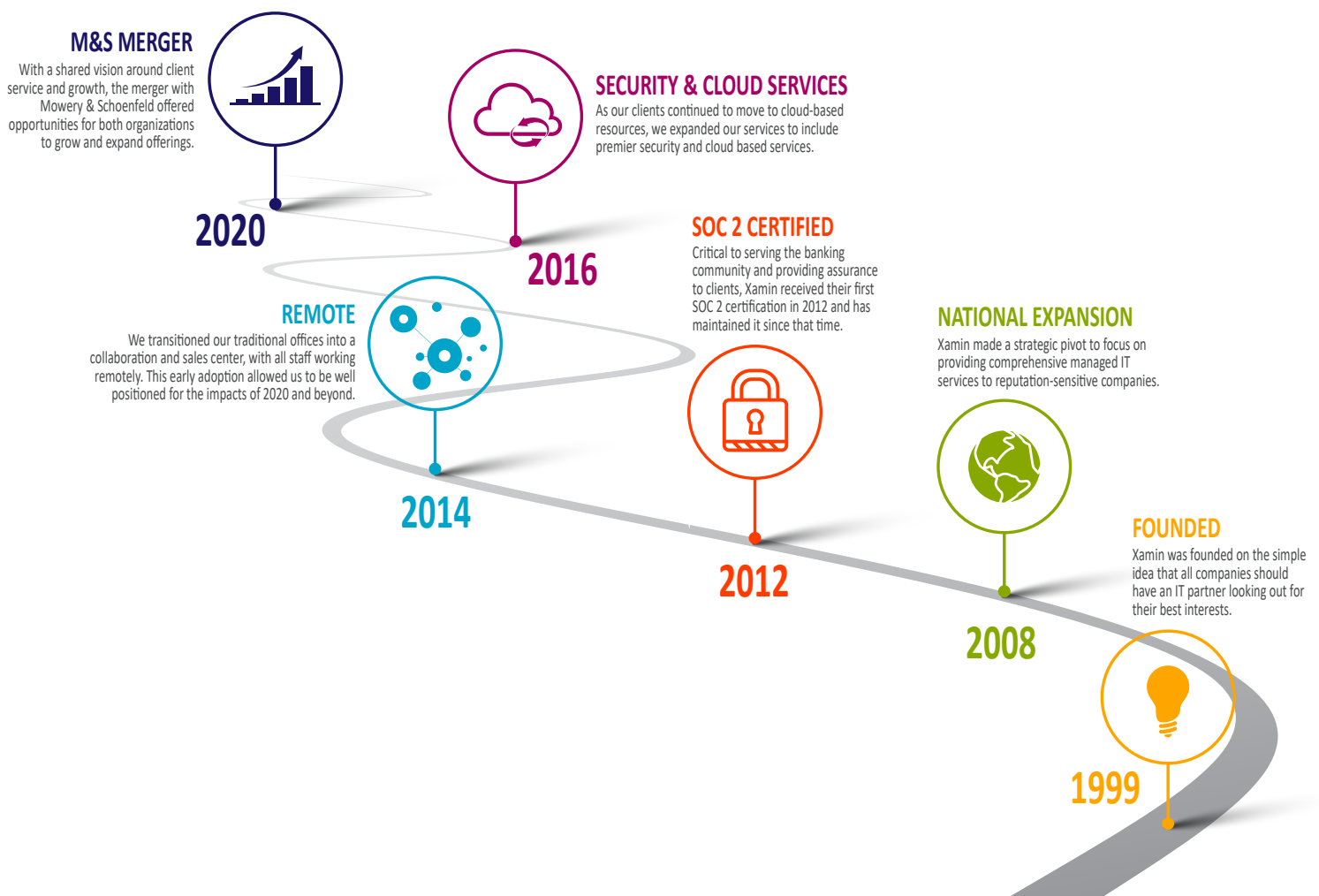
# About Us

Founded in 1999, Xamin provides managed IT solutions including infrastructure, security, data protection, cloud, and other IT-related professional services. We work with organizations in multiple industries including financial, healthcare, legal, accounting, manufacturing, construction and others.

Organizations face many risks, from remaining compliant amid ever-changing regulations to preparing for disasters, safeguarding against cyberattacks, and keeping their remote workforces productive and secure. Facing heightened risks, companies need a security-focused managed IT services team on their side.

Xamin provides a full catalog of technology solutions. Unlike other service providers, Xamin is a SOC 2 certified company in the trust principles of confidentiality and security, which requires an annual third-party audit.

Today's technology is always changing, which is why Xamin is constantly evolving to improve partnerships, strategy and solutions. The company differentiates itself by investing deeply in its white-glove advisory approach, and always provides versatility.



# Our Partnership with Mowery & Schoenfeld

---

*This is an exciting time for our organization! As we look to the future, the Xamin leadership team worked tirelessly to find a partner that would allow us to maintain our brand and level of service. The joining of Mowery & Schoenfeld and Xamin will allow us to grow our business, provide additional best-in-class services, and maintain our culture into the future.*

*- Jonathan Smith, founder of Xamin*

---



In August of 2020, Xamin joined forces with Mowery & Schoenfeld. Xamin operates as a subsidiary of Mowery & Schoenfeld and Jonathan Smith, founder of Xamin, continues to lead the Xamin team and is a partner of Mowery & Schoenfeld.

While both companies will continue to run under their current brands and management, this merger has expanded the services previously offered by each individual organization.

With a history of working together, this collaboration is a natural fit. Both share core values of superior client services and a prioritize culture. This merger allows each business to focus on what they do best individually – as a top accounting firm and SOC 2 certified technology company – while increasing reach, resources and offerings.





## What is SOC 2 Certification?

---

The American Institute of Certified Public Accountants (AICPA) developed the Service Organization Control (SOC) 2 report. This report provides annual oversight and controls for a technology service provider. Specifically, any company storing customer data in the cloud (private or public) must meet the standards designed to minimize risk and exposure.

To become SOC 2 certified, a third-party audit firm must complete a full review of the company – requiring IT partners to not only establish procedures, but also to follow strict security policies. This certification indicates that an IT provider follows the “trust principles” laid out by the AICPA. In other words, a SOC 2 certification ultimately provides reassurance to an organization that its consumer data is secure, available, confidential and private.

# Benefits of SOC 2 Certification

---

Organizations in any industry have data and people they want to protect. Having an IT partner who has gone through the SOC 2 audit and certification process provides business leaders with peace of mind. Xamin has maintained a SOC 2 certification each year since 2012, with zero deviations noted during the annual audit process. While many consumers do not fully recognize the importance of a SOC 2 certification, businesses appreciate this commitment to excellence.

---

## THE FIVE SOC 2 PRINCIPLES



### SECURITY

---

Meeting the Security standard guarantees information and systems are protected against unauthorized access, transfer of data or deletion of data.



### AVAILABILITY

---

Availability refers to the performance of the system, and also the circumstances that allow access to a system. Monitoring system function and availability, as well as establishing protocols for handling a crisis are considered.



### PROCESS INTEGRITY

---

Process Integrity ensures data processing is authorized, timely, consistent, correct and complete. The IT systems must meet the criteria set by the AICPA to ensure the processes used to manage data are secure.



### CONFIDENTIALITY

---

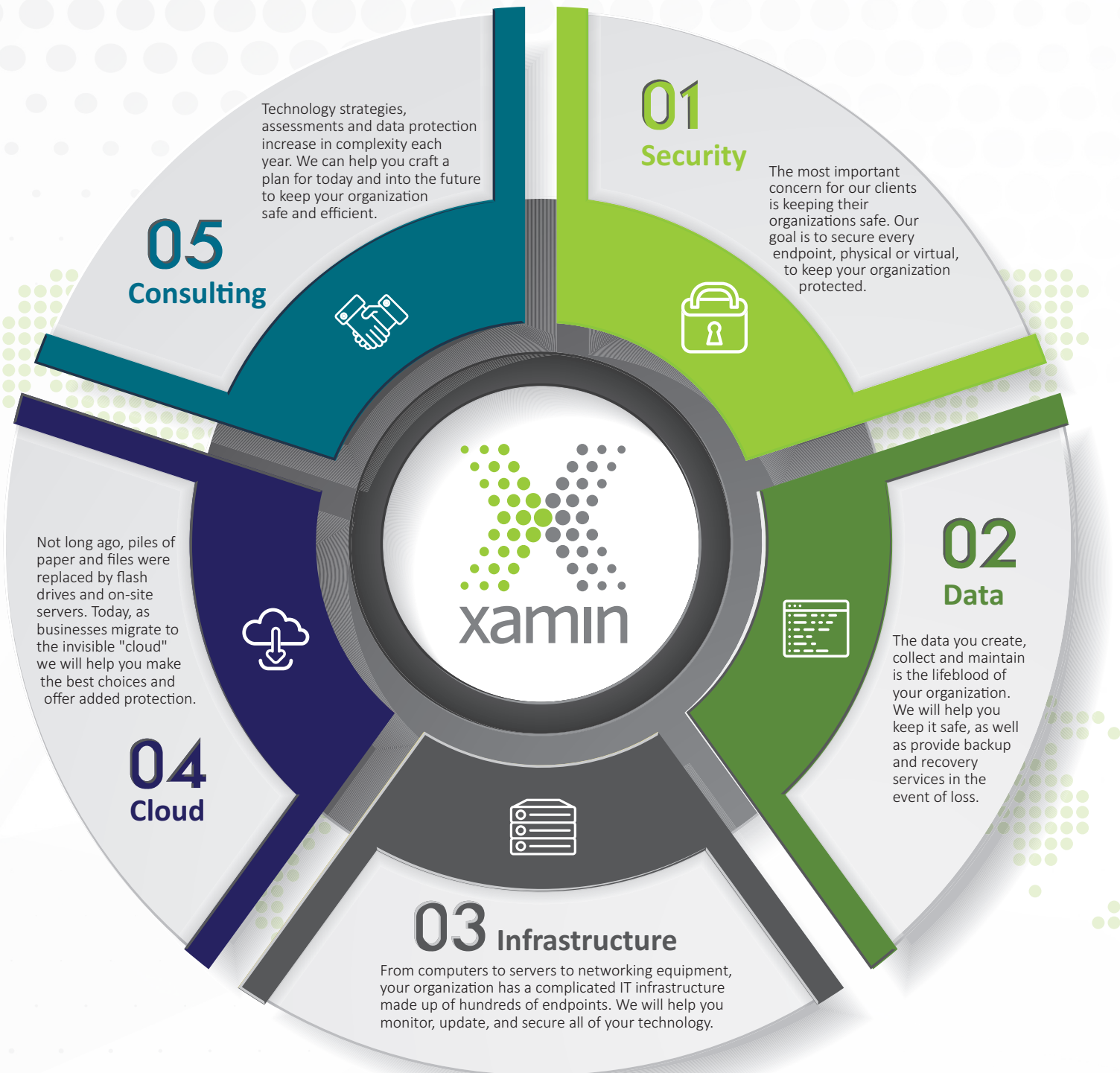
Confidentiality is key when IT solution providers are working with companies who have large amounts of sensitive data, which is becoming more and more common in a remote, cloud-based era. The confidentiality principle ensures your system protects consumer data and only approved users have access to the data.



### PRIVACY

---

Privacy refers to the way a system retrieves, holds, discloses, and removes sensitive personal information. This process must be done in accordance with an organization's privacy notice, as well as generally accepted privacy principle.



# Complete Solutions Catalog

We focus on helping clients solve problems each day. While we strive to always maintain our personal touch and entrepreneurial spirit, our services must also be specialized to meet the needs of our clients. We provide comprehensive managed IT services, focused on security and designed for each individual client. We work with organization of all sizes in diverse industries.

## Security

### FIREWALL MANAGEMENT

- Detailed traffic analysis
- Intrusion detection monitoring
- Detailed reporting

### SECURITY INFORMATION AND EVENT MANAGEMENT (SIEM)

- Security incident event monitoring
- Firewalls, servers and network devices
- Detailed reporting

### VULNERABILITY MANAGEMENT (VMS)

- Vulnerability management
- Proactive recurring scans
- Reporting and remediation

### DOMAIN NAME SYSTEM (DNS)

- Managed cloud DNS
- Intelligent content filtering
- Powered by cisco umbrella

### PASSWORD RESET

- Unlock and reset passwords
- 24/7/365 mobile application

### PASSWORD MANAGEMENT

- Password management system
- Corporate and personal passwords
- Robust browser based interface

### MOBILE

- Mobile device management (MDM)
- Manage and secure mobile devices
- Tracking, lock and remote wipe

### AUTHENTICATION

- Multi-factor authentication (MFA)
- Cloud based delivery
- Mobile or token based authentication

### ENDPOINT INTELLIGENCE

- Endpoint PII monitoring
- Gain visibility of remote data sprawl
- Demonstrate regulatory compliance

### SECURITY AWARENESS TRAINING

- Threat intelligence driven education
- Ongoing assessments and simulations
- Realistic reporting of user risk exposure

## Infrastructure

### INFRASTRUCTURE MONITORING

- 24/7 monitoring and alerting
- Endpoint protection
- Patch management

### INFRASTRUCTURE MANAGEMENT

- 24/7 monitoring and technical support
- Quarterly business review
- Dedicated relationship manager

### WORKSTATION & DEVICE

- Windows and macOS
- Layered endpoint protection
- Help desk support

### WIDE AREA NETWORK (WAN)

- Fully managed WAN solution
- Internet provider (ISP) agnostic
- Redundant failover

## Cloud

### MICROSOFT 365

- Office applications
- OneDrive
- Migration services

### MICROSOFT EXCHANGE ONLINE

- E-mail, calendar & contacts
- Outlook and mobile device support
- Migration services

### CLOUD COMPUTING

- Private/Hybrid cloud
- Microsoft Azure
- Amazon AWS

### E-MAIL PROTECTION

- E-mail threat protection (SPAM)
- E-mail encryption
- Continuity service
- Data loss prevention
- Archiving and eDiscovery

## Data Protection

### SERVER

- Image based backup and recovery
- On-prem storage and replication
- Encryption at rest and in-flight

### CLOUD RECOVERY

- Image replication to cloud
- Cloud or onsite recovery options
- Cloud Sandbox DR testing

### WORKSTATION

- Backup direct to cloud
- SOC certified datacenters
- Encryption at rest and in-flight

### MICROSOFT 365

- Backup cloud to cloud
- Secure datacenters
- Encryption at rest and in-flight

## Professional Services

### CONSULTING

- IT and security risk assessments
- Strategic IT review and planning
- FFIEC, HIPAA & CMMC compliance

### PROJECT DEPLOYMENT

- Onsite/Remote deployments
- Post implementation support
- Coordination and procurement

### SOLUTION ENGINEERING

- Server and desktop virtualization
- Disaster and business continuity
- Datacenter and cloud

### RECOVERY TESTING

- Sandbox and cloud recovery testing
- Detailed testing reports
- Remediation services



# The Xamin Proven Process

## Discovery



### Kickoff

Meet with our leadership and technical teams.



### Assessment

Discuss current practices, concerns and issues.



### IT Review

Review the security and performance of all IT systems.

PHASE 1

## Strategy



### Roadmap Plan

Work with you to create a short- and long-term plan to address your IT needs.



### Review and Recommend

Present a high-level recommendation on how to proceed.



### Consulting and Guidance

Provide immediate and ongoing consulting and guidance.

PHASE 2

## Onboarding



### Project Planning

Create a plan for services based on your schedule and needs.



### Installation

Install software and hardware solutions to support IT services.



### System Documentation

Create procedures to measure and document systems.

PHASE 3

## Implementation



### Security

Secure your systems from threats including:

- External Threats
- Internal Vulnerabilities
- Internet Perimeter
- Compliance



### Infrastructure

Support all infrastructure including:

- Workstation & Device
- Server & Network
- Virtualization
- Cloud Services



### Projects

Support IT processes including:

- Engineering
- Procurement
- Deployment
- Project Coordination
- Consulting



### Continuity

Ensure data is secure and accessible through:

- Data Retention
- Remote Access
- Datacenter Colocation
- Disaster Recovery
- Cloud Services

## PHASE 4



### Quarterly Review

We meet with our clients to continuously assess their security and performance against baseline measurements.

## Results



### Risk Mitigation

Our top priority is to protect your organization from risk.



### Availability

We keep your systems up and running to ensure a smooth work environment.



### Compliance and Productivity

For our most data-sensitive clients, our procedures will meet all requirements.

## PHASE 5



### Review

Continual feedback for strong partnerships

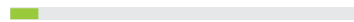
# Technology Assessment Process



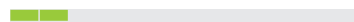
## INTRODUCTION

We begin every engagement by designing an approach to meet your needs. Our assessments can be tailored based on whether your organization needs one-time reassurance, a thorough strategic IT review, or somewhere in the middle.

### 1. Kick off call or meeting



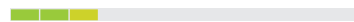
### 2. Complete infrastructure survey



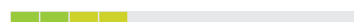
## DATA COLLECTION

Our process is designed to be easy for even a non-IT staff member to help complete. We will be there to help you with any questions or needs. This stage should take no more than one week from start to finish.

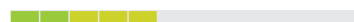
### 3. Receive and connect computer to network



### 4. Xamin runs complete scan



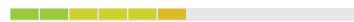
### 5. Return computer in provided packaging



## ANALYZE CLIENT SECURITY

Each organization will receive multiple tailored reports. This analysis is easy to understand and will provide a clear picture of security or technology concerns to be addressed.

### 6. Risk summary



### 7. Security scorecard



### 8. Microsoft 365 security review



### 9. Additional reports



## RECOMMENDATIONS

As part of the assessment we will provide clients with an executive summary, including any mitigation steps. We provide this regardless of your current IT partners or whomever you work with in the future.

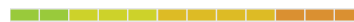
### 10. Complete assessment report



### 11. Share all documents



### 12. Review meeting



## ONGOING ASSESSMENTS

We strongly recommend each of our clients complete quarterly assessments to measure progress against an initial baseline.

### 1 Security Baseline

We hope to begin any engagement with a baseline assessment to guide our recommendations.

### 2 Ongoing Measurement

With a baseline in place, a regularly scheduled review can identify concerning trends or opportunities.

### 3 Assess and Adjust

An ongoing assessment allows an organization to take a proactive and timely approach to security.



Customer Retention (YOY)

98%



Clients Served

999+



Network Uptime

99.9%



Years in Business

20+



## Is Xamin the Right Partner for me?

---

At Xamin, we believe in taking a consultative, white-glove approach to our engagements. We offer a complete catalog of consulting, cybersecurity and managed IT services. We tailor our solutions based on each client's specific needs with the goal of being your trusted partner. The following are some of the most common questions we receive when speaking with new clients. Please do not hesitate to reach out to learn more.

### WE ALREADY HAVE AN INTERNAL IT TEAM

Many organizations have very competent, onsite IT teams. We can augment the IT staff by helping automate certain tasks so they can focus on helping their users. Additionally, if you have any concerns or if you are responsible for a significant amount of sensitive data, it can be a good idea to get an outside, third-party assessment performed regularly to head off any potential issues.

### DO YOU SPECIALIZE IN ANY INDUSTRIES?

Our SOC 2 certification qualifies Xamin to manage IT for the most reputation-sensitive companies such as banks, financial institutions and healthcare providers. While these make up many of our clients, we work with organizations in diverse industries from manufacturing to professional services to education. The bottom line is that if you have data to protect, we are here to help!

### IS IT NECESSARY FOR MY PROVIDER TO BE SOC 2 CERTIFIED?

With only 1% of all MSPs SOC 2 certified, it definitely is not a requirement. However, the SOC 2 holds our organization to the highest operational, security and service standards; as well as provides assurance to all of our clients. We are very proud of the work we have done to maintain this certification every year.

### WE ALREADY HAVE AN EXTERNAL MANAGED SERVICE PROVIDER (MSP)

The perfect time to begin discussions with a new provider is before your current contract ends. We find many of our relationships begin with an assessment, where we simply provide an unbiased, third-party review of your current situation. We never apply pressure during an initial meeting.

### DO YOU WORK WITH COMPANIES OF A SPECIFIC SIZE?

We work with companies of all shapes and sizes, and are happy to provide a custom package based on your needs. Our team is designed to most efficiently provide core managed IT services to companies with up to 500 full-time employees.

### SHOULD I BE CONCERNED ABOUT A DATA BREACH?

The simple answer is, yes. Every organization should be managing data, assessing security practices, and preparing for a potential breach on a daily basis. If you are not actively thinking about and planning your cybersecurity strategy, you are likely a target and at increased risk of a costly breach.



"Having an IT partner  
who has put themselves  
through the rigors of  
SOC means I get to  
sleep at night."

*- Current Xamin Client*

p (844) 449-2646  
f (847) 883-8704

xamin.com mslc.com  
@xamininc @msllccpas

475 Half Day Road, Suite 500  
Lincolnshire, IL 60069

311 S. Wacker Drive, Suite 2650  
Chicago, IL 60606