

# CASE STUDY



DOOLITTLE & GANOS  
INVESTMENT COUNSEL, LLC

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**Doolittle & Ganos Investment Counsel, LLC**, ([www.doolittleganos.com](http://www.doolittleganos.com)) is a Carmel, CA-based investment advisory firm that serves families and non-profit organizations.

## Challenge

Doolittle & Ganos had a specific and compelling need: to be able to operate remotely via Internet from virtually any location. Business continuity of mission critical applications could be achieved only by embracing cloud computing. Further investigation into cloud computing enabled the firm to learn about technology integration and its ability to concurrently interact different programs to generate real-time data and information.

## Solution

The core characteristics the firm was seeking in an integration platform were *flexibility* and *open architecture*. A review of the solutions available on the market revealed that platforms like the one offered by Fidelity did not allow “full integration.” The firm selected then AppCrown platform not only for its flexibility and open architecture but also because of its ability to seamlessly integrate with third-party providers, namely, Advisor Products, Doolittle & Ganos’ Web hosting vendor.

## Results

Among the most significant results that Doolittle & Ganos has derived from integration, include a more effective control over every aspect of their workflows transfer to AppCrown/Salesforce. Whether the task is related to business development, portfolio management, administrative reporting or filing a property tax return, AppCrown technology enables the firm to automate processes, avoid redundancies, minimize error margins and ensure higher levels of efficiency and business continuity.